Tips for Conducting a Performance Review Meeting

The Performance Review Meeting is an opportunity to acknowledge employees for their contributions throughout the year. If the employee leaves enthusiastic about starting the New Year and inspired about producing great results, then the meeting is successful. Employees should feel good about their performance review and their contributions.

Preparing for the meeting

- Print the evaluation before the meeting.
- Identify one or two themes that contributed to the employee’s success. For example; overall strengths/and/or areas for potential growth. Gather specific examples about what the employee accomplished and behaviors that represent the STARS values.
- Schedule the meeting time a few days in advance, ensuring the location is a private, quiet place away from distractions. Allow sufficient time for discussion.

Conducting the meeting

- At the onset of the meeting, ask that all electronic devices are put away and remove other distractions.
- Open the meeting acknowledging the employee’s positive contributions for the year and how those results impact the overall department and team.
- Establish the purpose of the meeting and outline the discussion.
  - For example say: “The purpose of this meeting is to review your performance goals for the year, beginning with the STARS values. I’ll review the rating and my comments. Then we will review each of your performance goals, where you will have the opportunity to respond, ensuring that I accurately incorporated your comments from the self-evaluation.”
- Avoid discussing motivation or personal issues. Concentrate on the employee's behavior and how that behavior impacts the organization.
- When the employee is sharing his/her perspective, use eye contact and remain calm and focused.
- If there are areas that need improvement, encourage your employee to come up with solutions for improvement.

Closing the meeting

- Summarize the meeting and any agreements to carry forward to the next year.
- At the end of the review, ask the employee how you can support him/her and his/her success.
- Document the conversation in the comment box on the “To Do” step in your Workday inbox.
- Schedule a meeting to review and set goals for the following year.
Things to remember:

- You own the rating decision and represent the organization.
- If the rating changes from your original assessment, own the new rating. Do not say you disagree with the decision.
- Discussing the status of other employees is inappropriate.
- Stay focused on this year’s rating, not past or future reviews.
- If you feel that the environment is becoming argumentative, suggest picking up the discussion at another time.
**Meeting Planning Tool**: Use this space to write notes to prepare for the evaluation.

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