

Manager Playbook: Performance Reviews

Performance Reviews shouldn't feel intimidating or like an HR formality, but rather a chance to acknowledge and reward the hard work your team has done and talk openly about what went well, what needs work, and how they want to grow next year.

Your Role as a Manager

- Provide guidance and tactical support where needed
- Coach and encourage progress and ownership
- Set clear expectations + hold your team accountable to them

- Provide **consistent, clear, and honest** feedback
- Highlight **bright spots**
- **Don't shy away** from addressing things that need to improve
- Give **practical guidance** on where/how they can improve

As it relates to Performance Reviews...

How Does It Work?



Review Others' Inputs

Look at feedback from 1) the self-review(s) you receive from your team, 2) any peer feedback you receive from HR, and 3) any additional feedback from stakeholders (i.e. clients, former managers) received about the employee.



Complete Your Manager Review

Reference others' inputs and provide evidence from your own experience. You may also be asked to share compensation recommendations as part of the annual review process. Aim for meaningful differentiation of performance across team members.



Hold Review Conversation

Schedule 45-60 min convo to review their performance, compensation outcomes, and tee up their goal setting for this year.



Watch Out!

Be on the lookout for biases as you're doing your review...

- **Recency:** Focusing too much on what happened lately instead of the whole review period.
- **Centrality:** Rating everyone in the middle to avoid making tough decisions.
- **Affinity:** Letting your feelings about a person influence your review instead of their actual performance.
- **Politeness:** Not wanting to "rock the boat" instead of giving honest feedback.

Tips & Tricks

A Great Written Review...

- Provides evidence
- Moves the plot forward
- Is thoughtful and objective
- Considers the full year

How Do I Give Feedback?

- Remember your role as their manager
- Clarity is kind
- Separate the person from their performance
- Don't leave out the good stuff!

Helping Them Set Goals

- Intersection of business outcomes + their career aspirations
- Ambitiously attainable
- Can be made snackable
- They have to feel possible

Suggested Convo Structure

Reflecting on the Past Year

- Ask: How do you feel about your performance last year?
- Share Your POV:
 - Bright spots/strengths (2-4)
 - Development areas (2-4)
 - Share performance rating
 - Share compensation decisions

Ask if anything is unclear before moving on in the convo

Looking Forward to the Upcoming Year

- Where do you want to focus next year to further your business impact and career goals?
- Where can I support as your manager?