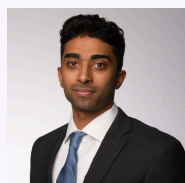


Live Webinar

Beyond Mid-Year: How High-Performing Teams Run Reviews Year-Round

Run the right review at the right time — decision-driven reviews.

📅 Thursday, May 21 ⌚ 2:00–2:45 PM ET



Satish Kumar

Head of PerformSpark | Strategy & Growth

[Register for Webinar](#)



Trainery HCM | PerformSpark — the performance module

Session Framing & Agenda

This session will be educational and practical.

- 1 Why calendar-only reviews fall short & which review types to use
- 2 How to add flexibility without losing structure
- 3 How AI and connected data improve review quality
- 4 Live PerformSpark demo
- 5 Q&A

Session Presenter



Satish Kumar

Strategy & Growth

PerformSpark

POLL #1

How does your organization primarily run performance reviews today?

A Annual or year-end only

B Mid-year and year-end

C Quarterly or recurring check-ins

D Different review types for different situations

E We are still figuring this out

The Problem With Calendar-Only Reviews

"73% of HR leaders say annual reviews don't surface performance issues early enough" → 73%'

What Happens

- Reviews happen mid-year / year-end
- Managers rely on memory
- Feedback gets compressed into one event
- Performance issues surface too late

What Gets Missed

- ✗ Coaching moments
- ✗ Promotion readiness
- ✗ Early risk signals
- ✗ Onboarding checkpoints
- ✗ Development needs







HR leaders say annual reviews are insufficient (Gartner 2025)

The Better Model: Decision-Driven Reviews

The review should match the decision. Each review type serves a specific purpose in the performance management lifecycle.

Decision Needed

Review Type

 <p>How is this person performing overall? Comprehensive annual assessment</p>	<p>Annual / Year-End Review</p>
 <p>Is this employee settling in successfully? New hire integration assessment</p>	<p>Onboarding / Probation Review</p>
 <p>Is this person ready for promotion? Leadership readiness evaluation</p>	<p>360 / Talent Review</p>
 <p>Is performance slipping? Early intervention needed</p>	<p>Check-In / PIP / Manager 1-on-1</p>
 <p>Do ratings need fairness review? Calibration and consistency check</p>	<p>Calibration Review</p>
 <p>Who is ready for future leadership? Succession planning assessment</p>	<p>9-Box / Succession Review</p>

 **Key Insight:** Annual reviews are necessary, but not sufficient. Different review types serve different purposes in the performance management lifecycle.

POLL #2

Which review moment is hardest for your organization to manage consistently?

- A** Mid-year / year-end reviews
- B** Onboarding or probation reviews
- C** Performance improvement / PIPs
- D** Calibration and rating fairness

Sample year-round review calendar

Two reviews follow the calendar. The rest follow the business.

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

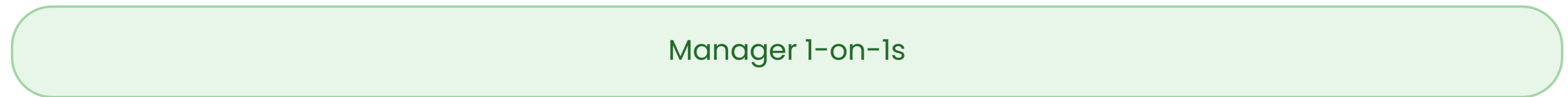
Fixed cycle

Same date every year



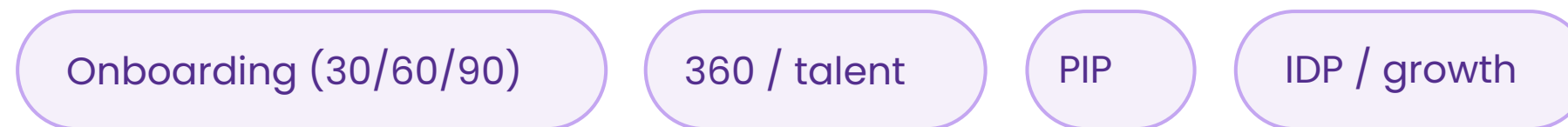
Continuous

Monthly, all year



Event-triggered

Fires when needed

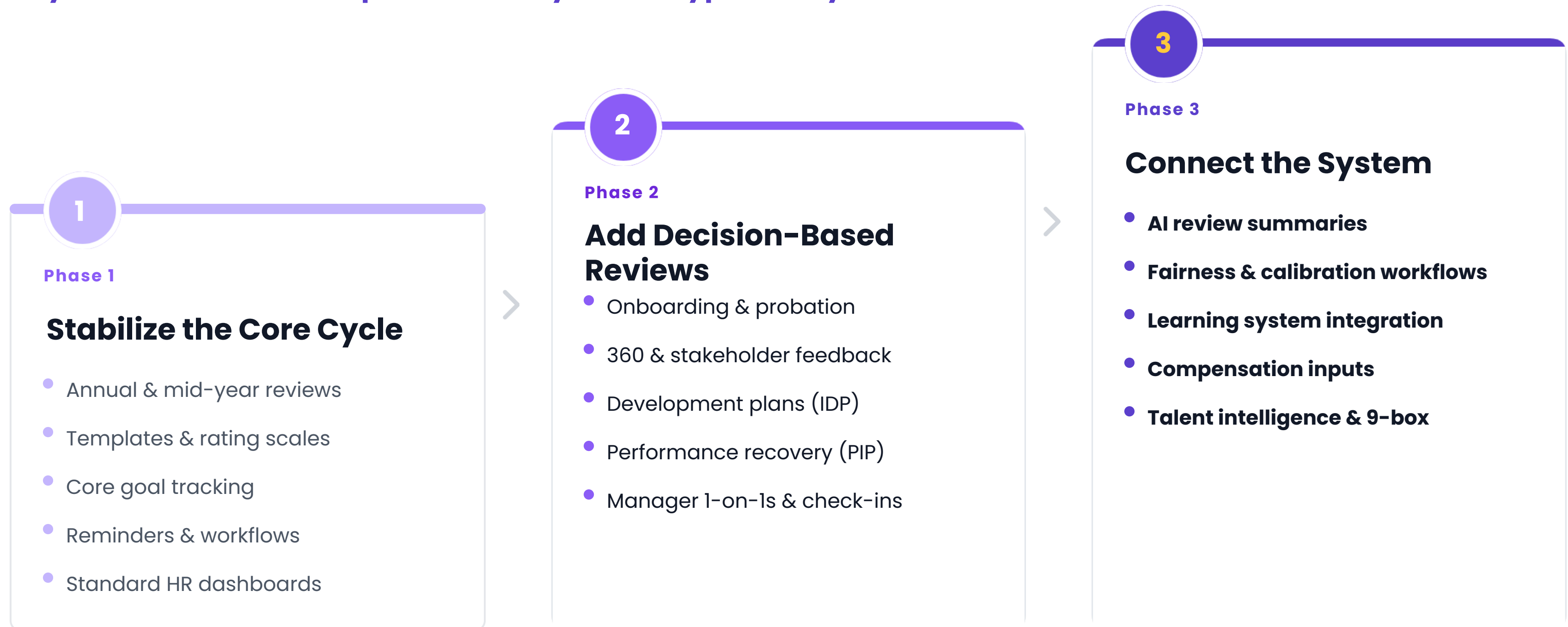


Triggered by hire date, promotion consideration, performance signal, or post-review development need.

● Fixed cycle
 ● Calibration
 ● Continuous
 ● Event-triggered

How to Start Without Overwhelming the Organization

Buyers do not need to implement every review type on day one.



Flexibility Without Chaos

The goal is not more process. The goal is structured flexibility.

Standardize the Building Blocks

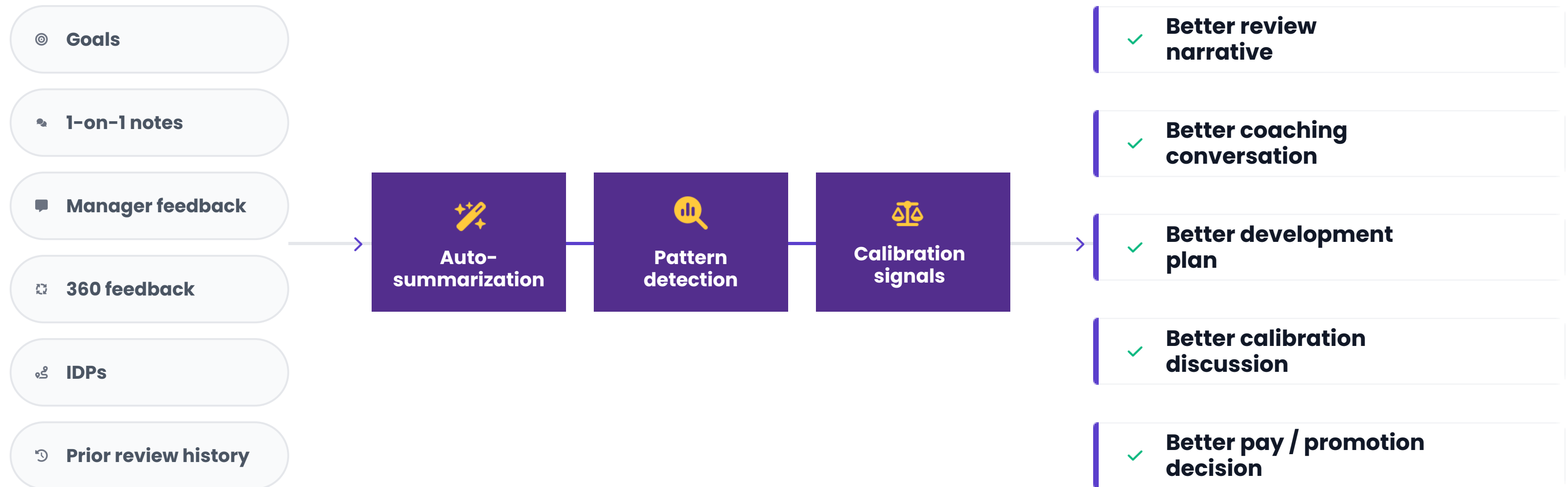
- Templates
- Competencies
- Goals
- Rating scales
- Workflows

Centralize the Evidence

- Feedback & notes
- Goals
- Kudos
- IDPs
- Review history
- Calibration outcomes

From Memory-Based to Evidence-Based Reviews

The best reviews are built from the work, feedback, and development activity that happened all year.



What This Looks Like in PerformSpark

Configure different review styles, capture feedback throughout the year, and connect performance to growth



Configure Review Styles

Launch structured cycles, check-ins, 360s, onboarding/probation reviews, IDPs, and PIPs



Capture Feedback Year-Round

Use AI to summarize context and improve feedback quality with real-time insights



HR Visibility & Analytics

Track participation, ratings, calibration, and follow-through across all reviews



Connect to Learning & Growth

Link performance to learning, compensation, and development when ready

PerformSpark Dashboard

sample View

Performance Overview

Filter

+ New Review

Active Reviews

24

+12% from last month

Completion Rate

87%

+5% this week

Pending Actions

8

Requires attention

System status: **Operational**

Last updated: 2 min ago

AI That Improves the Conversation

AI should improve review quality, not replace human judgment.

For Managers

- ✓ Draft summaries
- ✓ Tone checks
- ✓ Feedback prompts

For HR

- ✓ Surface patterns
- ✓ Identify rating disparities
- ✓ Support calibration

For Employees

- ✓ Clearer feedback
- ✓ Better next steps
- ✓ Stronger development plans

AI Performance Review Summary

Generated Summary:

Sarah has demonstrated strong leadership in Q3, with 92% goal completion rate. Key achievements include launching the new onboarding program and improving team retention by 15%.

Strengths:

Leadership Communication Project Management

Development Areas:

Time Management Delegation

Calibration: Where Flexibility Becomes Fairness

More review types create more signal. Calibration helps HR turn that signal into fairer decisions.

Without Calibration

 Different managers

 Different standards

 Inconsistent ratings

 **Harder pay and promotion decisions**

With Calibration

 Shared context

 Rating distribution visibility

 Talent discussion

 Documented decisions

 **More defensible outcomes**

Stop Documentation Theater: Reviews Should Trigger Action

If nothing happens after the review, the review becomes documentation theater.



POLL #3

If you could fix one thing about reviews before year-end, what would it be?

A Better manager follow-through

B Earlier performance intervention


C Stronger development planning

D Fairer calibration / pay decisions

Live Demo: A Year-Round Review Workflow


What you're about to see.

- 1 **Configure a review style**
- 2 **Show feedback / check-in / 1-on-1 context**
- 3 **Show AI review summary**
- 4 **Show IDP / development action**
- 5 **Show calibration or HR visibility**
- 6 **Show how to connect** to learning and compensation when ready



John Doe
Software Engineer

Draft Review




AI-Generated Performance Summary


Generated 2m ago


Performance Overview: John has demonstrated strong technical skills in Q3, completing 95% of assigned tasks on time. His code quality has improved significantly, with a 30% reduction in bugs reported by QA.

Key Achievements: Led the migration to the new API framework, mentored 2 junior developers, and contributed to 3 major feature releases.

Inputs Analyzed

 4 Check-ins

 3 Goals

 2 Kudos

Continue to Draft Review

🔄 Switching to PerformSpark Live Environment...

Closing Takeaways

Key insights for implementing year-round performance reviews

1

Annual reviews are necessary, but not enough

Performance decisions happen all year round, not just on fixed calendar dates. The best systems create evidence, action, and follow-through.

2

Run the right review at the right time

The review type should match the specific decision: promotion, onboarding, growth, or intervention.

3

Documentation theater

Don't settle for isolated ratings and documentation theater. Drive real growth outcomes with structured flexibility.

Ready to transform your review cycles?

Get started with a personalized walkthrough



Book a 20-min PerformSpark walkthrough

- Live demo
- Q&A session
- Custom setup
- Free trial



Don't let reviews become documentation theater.
Make every review trigger meaningful action.

📺 **Recording Available:** You will receive the recording and slides after the session.

Questions?



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Scan to Book a Demo

Ready to transform your review cycles?

📅 Schedule a Call