PerformSpark™

LIVE WEBINAR

The Playbook for Turning Reviews into Action, Growth, and Accountability

Thursday, October 29, 2026 | 2:00–2:45 PM ET

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Eligible for SHRM and HRCI recertification credit

Today

What we will cover in the next 45 minutes

1. **The test most review processes fail**
2. **Eight rules for a better playbook**
3. **Score your own playbook**
4. **See it in practice**
5. **Your questions**

QUICK POLL

If an employee challenged their last raise today, how fast could you show the evidence behind it?

A **Same day**

B **Within a week**

C **We would have to reconstruct it**

D **We could not**

The test most review processes fail

Reviews are designed to be completed. They should be designed to be used.

A review passes the test when it can answer three questions later:

1

What did this person actually do?

2

What did we agree would happen next?

3

Why did we make the decision we made?

Eight rules

The full playbook, one idea at a time.

1. **One review cannot do four jobs**
2. **Only ask what a manager has actually seen**
3. **Capture beats recall**
4. **Calibrate evidence, not curves**
5. **Goals that cannot change get abandoned**
6. **Start development with work, not a course**
7. **Your first skills inventory already exists**
8. **Fix the job before you fix the rating**

RULE 1 OF 8

One review cannot do four jobs

The usual way

One annual review decides pay, gives feedback, plans development and documents performance, all in one meeting.

The better way

Separate the pay conversation from the growth conversation. When money is on the table, people stop hearing the feedback.

TRY THIS **Hold the development conversation at least four weeks before or after the pay conversation.**

RULE 2 OF 8

Only ask what a manager has actually seen

The usual way

Forms ask managers to rate qualities like “strategic thinking” that they rarely observe directly. They guess, and the guess becomes the record.

The better way

If a manager cannot point to one example, the question is wrong, or it belongs to someone who saw the work. Let employees bring examples their manager may have missed.

TRY THIS

Read each question on your form and ask: could the manager name one example? If not, cut it or give it to a reviewer who could.

RULE 3 OF 8

Capture beats recall

The usual way

A manager with 8 reports holding monthly 1:1s has 96 conversations a year. The annual form asks them to remember all of it.

The better way

Recency bias is a capture problem, not a manager problem. Record notes, goal updates and recognition as they happen, so the review is assembly instead of memory. Recognition balances a record that otherwise only captures problems.

TRY THIS **Compare who gets recognized with who gets top ratings. Where the two lists do not match, look closer.**

QUICK POLL

Do you use forced distribution or rating targets?

- **A** Yes, required
- **B** Guidelines only
- **C** No
- **D** Considering it

RULE 4 OF 8

Calibrate evidence, not curves

The usual way

Forced distributions applied to teams of four or five people. A bell curve needs a large group to mean anything.

The better way

At 75 to 300 employees, calibration should test the evidence behind each rating, not whether the ratings fit a shape.

TRY THIS

For every rating at the top or bottom of the scale, the manager brings the two strongest pieces of evidence. No evidence, no extreme rating.

RULE 5 OF 8

Goals that cannot change get abandoned

The usual way

Goals are set in January, overtaken by events by summer, and scored anyway in December.

The better way

Let goals change during the cycle with a written reason. At the end, the manager signs off on results rather than assuming them.

TRY THIS **Add one field to every goal: “What would make this goal no longer relevant?”**

RULE 6 OF 8

Start development with work, not a course

The usual way

The development plan says “take a leadership course.” It gets checked off and nothing changes.

The better way

Start with a real assignment that stretches the skill. Then attach the learning that supports it, in the same conversation.

TRY THIS **Every development goal names an assignment first and the learning second.**

RULE 7 OF 8

Your first skills inventory already exists

The usual way

Organizations spend months building a skills list for every role before they use it for anything.

The better way

Certifications, licenses and required training records already tell you who can do what, and when that expires. Expiry is skill decay you already track.

TRY THIS

Pick your five most critical roles. List what each requires and compare it with your training and certification records. Those gaps are your first skills plan.

RULE 8 OF 8

Fix the job before you fix the rating

The usual way

Raises are tied to ratings alone, while similar jobs sit in different pay grades because nobody evaluated them the same way.

The better way

The job sets the pay range, using consistent factors applied to every job. Performance then sets the raise within that range. The same rating should earn a bigger raise for someone low in their range than for someone near the top.

TRY THIS

Find two jobs you believe are equivalent. Check whether they are in the same grade. If you cannot explain why they are not, an employee will ask.

What ties it together: write down why, at the time



Eighteen months later, memory is not evidence. The record is.

Score your playbook

POLL 3

How is your organization doing with each rule?

1 = Not doing this 5 = Consistent across the organization

Rule 1	One review cannot do four jobs	1	2	3	4	5
Rule 2	Only ask what a manager has actually seen	1	2	3	4	5
Rule 3	Capture beats recall	1	2	3	4	5
Rule 4	Calibrate evidence, not curves	1	2	3	4	5
Rule 5	Goals that cannot change get abandoned	1	2	3	4	5
Rule 6	Start development with work, not a course	1	2	3	4	5
Rule 7	Your first skills inventory already exists	1	2	3	4	5
Rule 8	Fix the job before you fix the rating	1	2	3	4	5

Rate each rule in the poll. We will look at where the room scores lowest.

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The rules in one connected system

PRODUCT DEMONSTRATION

Product demonstration: the rules in one system

Follow one employee through one cycle:

1. **The completed review and the 12-month record**
2. **Goals that changed and were signed off**
3. **Review to development plan with learning attached**
4. **Skill gaps against what the role requires**
5. **A guided 1:1 with carried-forward actions**
6. **Review to pay**

This segment is a product demonstration.

Take the playbook with you

Download the 8-rule scorecard

Score your own playbook on one page.

performspark.ai/scorecard

Book a 30-minute playbook review

Walk your process through the eight rules with us.

performspark.ai/playbook-review

Questions? Use the Q&A panel.

Thank you

The webinar recording, slide deck, survey, and SHRM and HRCI codes will be emailed within 2 business days.

Credit is awarded after we verify your attendance and time in the session.

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