



WORKDOVE

Back to Basics:
A Step by Step Guide to
Performance Reviews That
Don't Suck

Our CEO/Co-Founder



Melissa Phillippi
CEO and Co-Founder

CEO and Co-Founder

Being able to practice your hobby for a living is something Melissa is incredibly grateful for. Helping people be great and the organizations they support thrive is what motivates and inspires Melissa on a daily basis. It's also her background for co-creating WorkDove in 2015. Leaning on years of coaching and training business owners, HR Leaders, and their staff, Melissa partners with the WorkDove team to create meaningful workflows and performance and talent management apps that work. Prior to Melissa's years in business coaching and consulting, she served as a CFP® professional.

Dove Detail: Learning her poor vision would prevent Melissa from flying fighter jets, she took to other extreme sports to fuel her adrenaline needs. Melissa holds a black belt in karate, has completed two Spartan Trifectas, and is known for her spear-throwing backyard events.



Agenda



Defining The Need and The Goal

(Good) Performance Review Elements

The Self-Assessment

Manager Assessment

The Meeting

Next Steps

Assumptions

- A correctly conducted performance review is helpful.
- People need and want to know where they stand, and what they can do to progress.
- Performance and behavioral data is useful and helpful for allocating resources, architecting organizational design, and assisting leadership succession decisions.
- The rating scale - or lack thereof - is not the issue. Performance review design and training is.

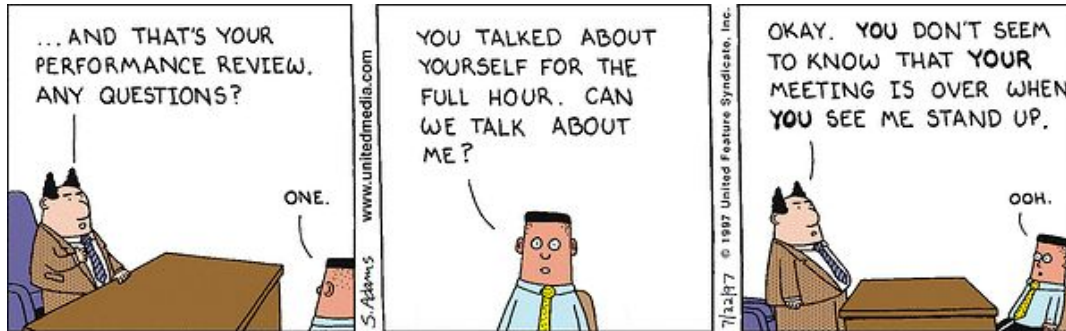


"Employees in organizations without scores were the most dissatisfied and frustrated."

Brian Kropp - HR Practice Leader at Gartner

Why do Performance Reviews Suck?

- Compliance vs. Development Focused
- Unexpressed Expectations leads to frustration
- Poorly defined and non-aligned objectives and goals
- Abysmal training, at all levels
- Too large span of control and lack of preparation time



Defining the Need

- ★ Building and Conducting Performance Reviews is a learned skill, not a natural talent.
- ★ The Passing of Time.... Fundamentals are forgotten and/or we become lazy.
- ★ Similar to our own CE in Human Resources, and ongoing training for every industry, performance management training must be revisited on a regular basis.



Step 1 to Creating Performance Reviews that Don't Suck

Create Buy-in to Move Forward

WHAT DO YOU

WANT?



Senior Leaders

- ROI/Profit
- Culture as a Competitive Advantage

Managers

- Coaching tools that are easy to use

HR

- Ability to make a strategic difference

Employees

- Appreciation
- Personal and Career Growth

What Motivates You Most

There are many things that motivate us.
But the **most powerful motivator of all is FEAR.**

We must **address and minimize doubt** to complete the process of buy-in.



Q: 2022 HR.com research reveals 38% of leaders view performance management as a “necessary evil” or “unnecessary waste of time.”* What do you think the #1 fear is for employees when it comes to performance reviews? Managers?

Defining Performance Reviews

What Are Performance Reviews

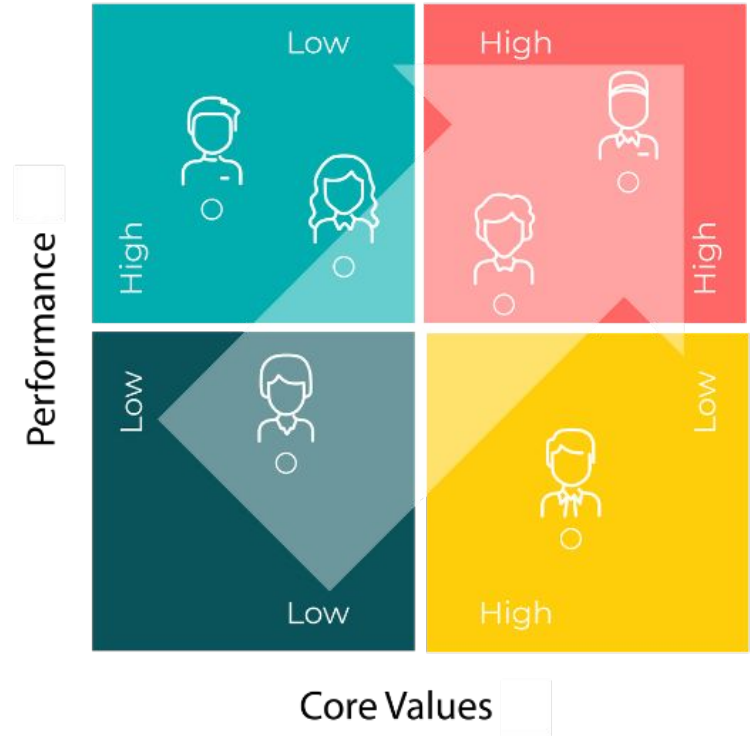
- ✓ INTENTIONAL time for Managers and Employees
- ✓ 25 - 50% Assessment of the Past,
25 - 50% Discussion About the Future.
- ✓ COACHING sessions, not Dilbert sessions.

What Performance Reviews Are NOT

- ✗ Long, one-sided conversations.
- ✗ The only real time employees and managers have sat down to discuss goals, progression, and professional development.
- ✗ Biased*, or half-hearted sessions from either party.
- ✗ The time to bring up something you should have had the courage to do months ago. No surprises.

What Does “Good” Look Like?

- Ultimately, you are trying to create a healthy, high-performing culture.
- High performing cultures are marked by:
 - The majority (not a bell curve) of employees up and to the right.
 - Observable behaviors that are in alignment with your core values, even when the “boss” is not around.
 - Consistent meeting or exceeding of performance expectations.
 - Low turnover of Stars, quick movement or turnover of “non-stars.”



Performance Review Elements - The Basics

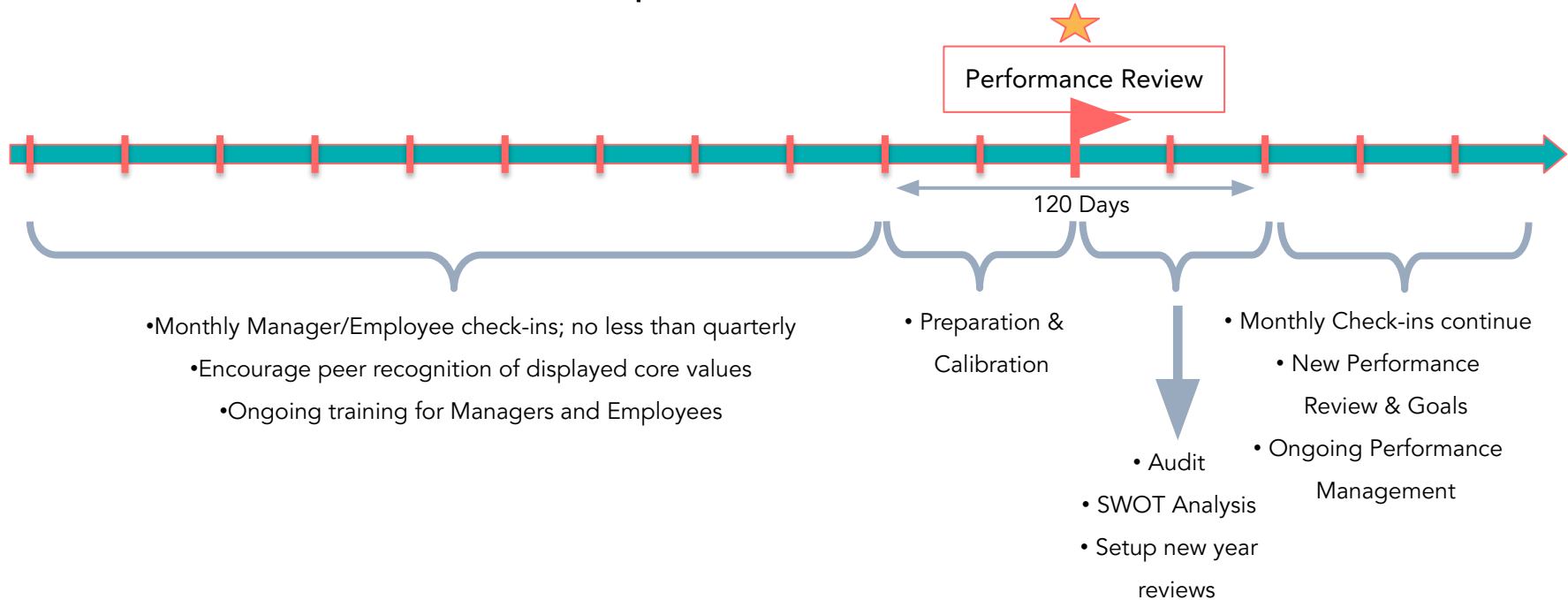
- #1 Rule - Keep it Simple and Focused
- Think PVM - Performance/Goals & Behaviors/Core Value Displays (What and How)
 - Job description-based performance objectives: 3 - 5, **and/or**
 - SMART Goals or OKRs
 - Behavioral Competencies and/or Core Values: 5 - 7 and WELL defined.*

“When everything is important, nothing is important.”



Performance Review Process

Sample 12-Month Cycle



Performance Review Elements - Holistic Approach

My Company

Search for an Employee...

Lindsay Admin User
Human Resources Specialist

Allison Meyers
Performance Review | Annual: 2022

Autosaved at 02:55:08pm Save & Close

Objectives Goals Core Values Development Satisfaction Summary Approval

☒ Show/Hide Employee Ratings Edit

1. Initiative Weight: 20%

Responds appropriately to improve outcomes, processes or measurements. Assumes responsibility and leadership when asked. Accomplishes goals independently, with little need for supervision. Takes ownership and accountability for own performance. Seeks out and/or accepts additional responsibilities in the context of the job.

Employee Notes ★ ★ ★ ★ ★

I have really grown here! I have taken the lead on a lot of projects already and have realized when it's time to delegate in order to get the most out of the team. I appreciate the increased responsibility and will continue to ask how I can help the team.

Coaching Notes ★ ★ ★ ★ ★

Great job on the leadership here Allison! I am really proud of the initiative you took on this project and the plan you have laid out to tackle the

Details
Profile
360° Feedback
Check-Ins
Recognition

Require collection of additional performance & behavior feedback from multiple sources and incorporate into the Performance Review.

Performance Review Elements - Define the Scale

My Company

Search for an Employee...

Lindsay Admin User
Human Resources Specialist

Autosaved at 02:55:08pm

Save & Close

Allison Meyers
Performance Review | Annual: 2022

Objectives Goals Core Values Development Satisfaction Summary Approval

☒ Show/Hide Employee Ratings

1. Percentage of leads generated via organic search (SEO) (%)

1 star = <15%, 2 stars = 16 - 25%, 3 stars = 26 - 40%, 4 stars = 41 - 60%, 5 stars = 61+%

Employee Notes

Our new tracking tool has been helpful providing insights into what keywords the market is searching for and how our pages have been performing against those. I have optimized our site based on all errors/areas of improvement our tool has indicated and have been working on deleting duplicate content. I am also working with our content team more closely to have articles created that contain our target key search words.

Coaching Notes

4 Stars: Good; Results clearly exceed requirements. Performance is of high quality and is achieved on a consistent basis.

Year: 2022

Review Cycle: Annual

Due Date: 12/31/2022

Goals/Performance Score by Manager: 3.51

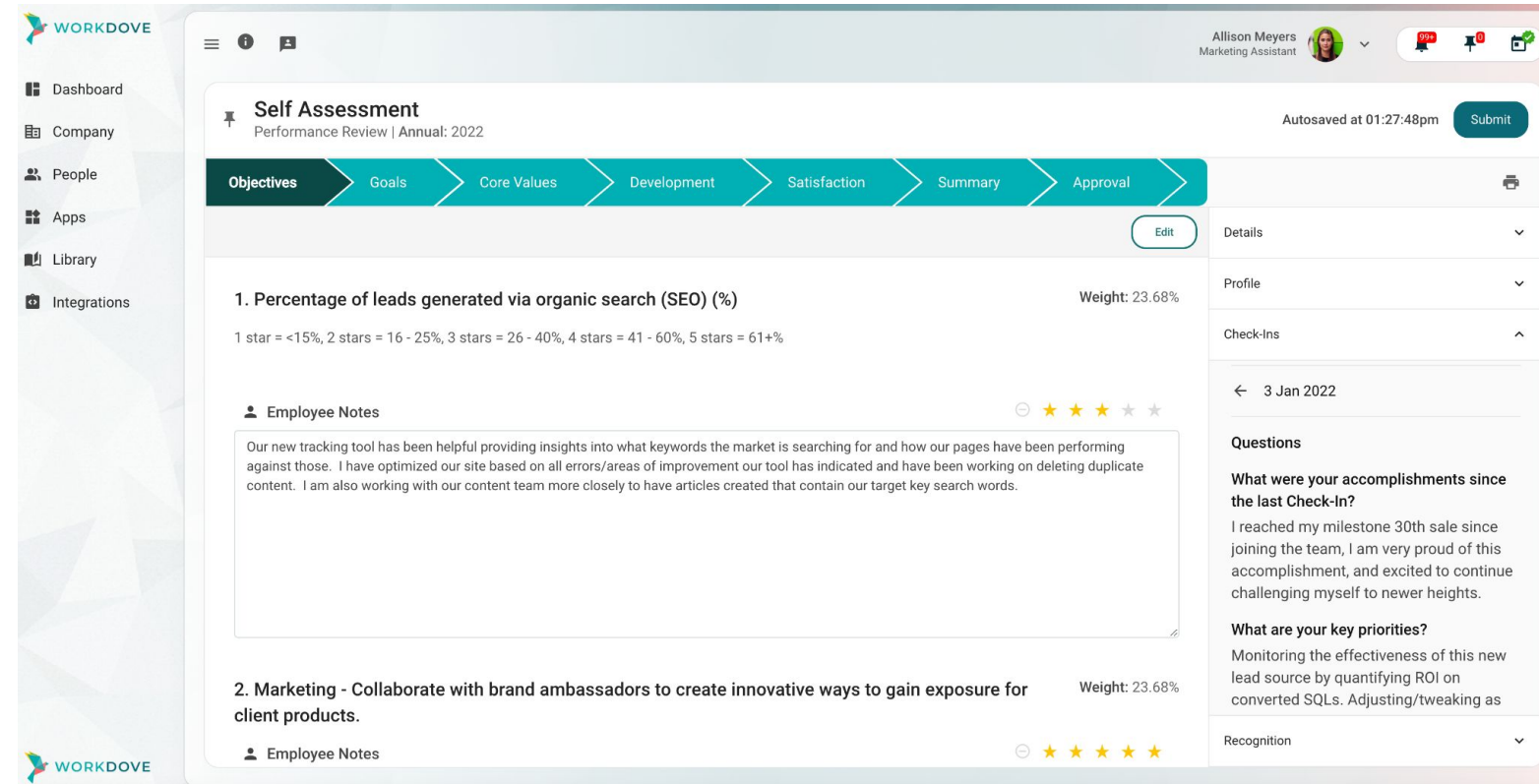
Core Values Score by Manager: 3.8

Goals/Performance Score by Employee: 3.49

Core Values Score by Employee: 3.6

Doing the work upfront to define expectations and the rating scale, and then further clarifying during an employee's first performance review, leads to less frustration.

Performance Review Elements - The Self Assessment



The screenshot shows the WorkDove Self Assessment interface. The top navigation bar includes a sidebar with links to Dashboard, Company, People, Apps, Library, and Integrations. The main header shows the user's name, Allison Meyers, Marketing Assistant, and a profile picture. The title of the assessment is "Self Assessment" for a "Performance Review | Annual: 2022". The assessment is autosaved at 01:27:48pm. The progress bar shows the following steps: Objectives (selected), Goals, Core Values, Development, Satisfaction, Summary, and Approval. The "Objectives" section is currently active, showing a list of objectives. The first objective is "1. Percentage of leads generated via organic search (SEO) (%)" with a weight of 23.68%. Below the objective is a star rating system (1 star = <15%, 2 stars = 16 - 25%, 3 stars = 26 - 40%, 4 stars = 41 - 60%, 5 stars = 61+%) and a text area for "Employee Notes". The second objective is "2. Marketing - Collaborate with brand ambassadors to create innovative ways to gain exposure for client products." with a weight of 23.68%. The right sidebar contains a "Details" section with a dropdown menu for "Profile", "Check-Ins", and "Questions". The "Check-Ins" section shows a date of "3 Jan 2022". The "Questions" section contains two questions: "What were your accomplishments since the last Check-In?" and "What are your key priorities?". The "Recognition" section is also visible at the bottom.

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Dashboard
Company
People
Apps
Library
Integrations

Allison Meyers
Marketing Assistant

Self Assessment
Performance Review | Annual: 2022

Autosaved at 01:27:48pm Submit

Objectives Goals Core Values Development Satisfaction Summary Approval

Edit

Details
Profile
Check-Ins
← 3 Jan 2022
Questions
What were your accomplishments since the last Check-In?
I reached my milestone 30th sale since joining the team, I am very proud of this accomplishment, and excited to continue challenging myself to newer heights.
What are your key priorities?
Monitoring the effectiveness of this new lead source by quantifying ROI on converted SQLs. Adjusting/tweaking as
Recognition

1. Percentage of leads generated via organic search (SEO) (%) Weight: 23.68%

1 star = <15%, 2 stars = 16 - 25%, 3 stars = 26 - 40%, 4 stars = 41 - 60%, 5 stars = 61+%

Employee Notes

Our new tracking tool has been helpful providing insights into what keywords the market is searching for and how our pages have been performing against those. I have optimized our site based on all errors/areas of improvement our tool has indicated and have been working on deleting duplicate content. I am also working with our content team more closely to have articles created that contain our target key search words.

2. Marketing - Collaborate with brand ambassadors to create innovative ways to gain exposure for client products. Weight: 23.68%

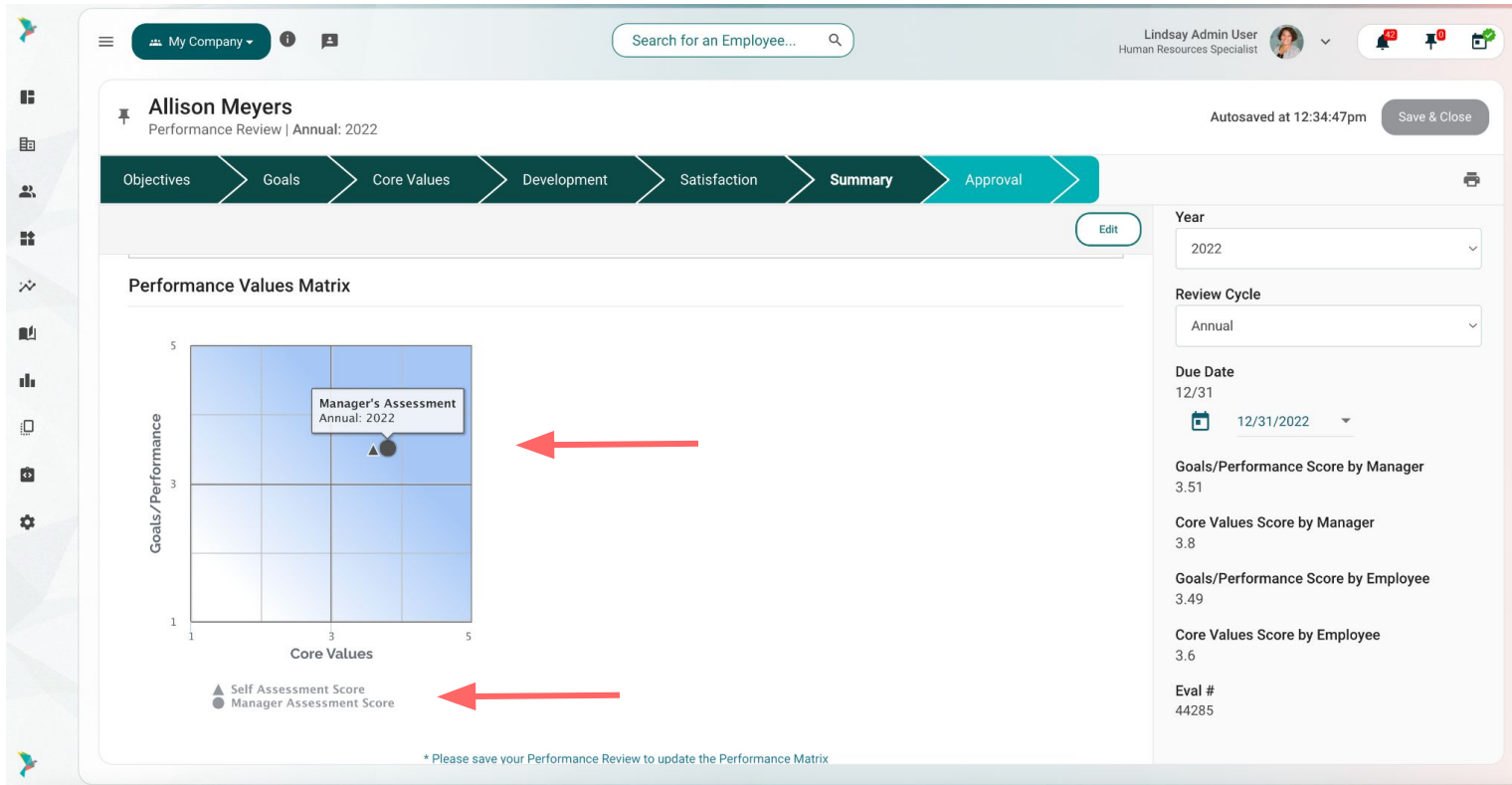
Employee Notes

WRITING

FORCES

CLARITY.

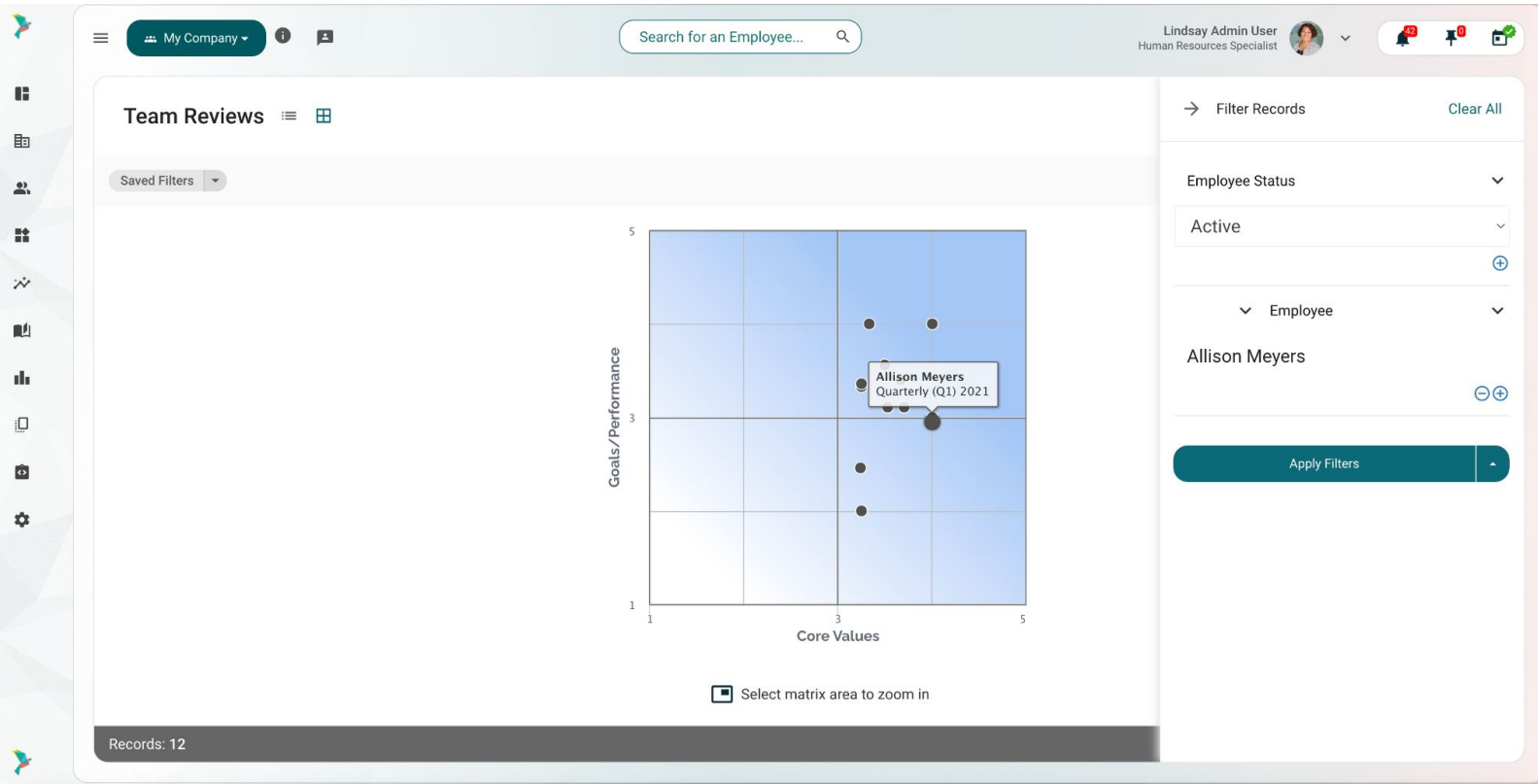
Performance Review Elements - Alignment



It's helpful for a manager to know what he/she/they are walking into.

It also helps provide a source of "self-check".

Performance Review Elements - Review Trends



As a rating manager, are you referencing the employee's past placements/scores?

Because they ARE.

Manager Assessment - Things to Watch out For

The screenshot shows the Workdove Manager Assessment interface for Allison Meyers. The top navigation bar includes a search bar, user profile (Lindsay Admin User), and notification icons. The main content area displays a performance review for Allison Meyers, with tabs for Objectives, Goals, Core Values, Development, Satisfaction, Summary, and Approval. The 'Objectives' tab is active, showing a list of objectives. The first objective is '3. Marketing - Assist in monitoring active marketing programs and developing ways to improve those campaigns.' with a weight of 26.32%. Below the objective, there are sections for 'Employee Notes' and 'Coaching Notes'. The 'Employee Notes' section shows a 3-star rating (Satisfactory; Competent and dependable level of performance. Meets expectations.) and a text box with the following content: 'We have increased our partnerships this quarter from 4 to 6, with the 7th in communication currently. The pandemic has certainly affected our ability to push harder but I am very proud of the partnerships we have now despite the challenges! I am also developing a relationship with a local podcaster who has some ideas for us and a need to grow their audience base to our target market.' The 'Coaching Notes' section shows a 3-star rating and a text box with the following content: 'While I appreciate your efforts to increase our partnerships this year, we have not seen the increase in leads from these active marketing programs that we really need. These programs really need to be monitored frequently and their ROI metrics reported on monthly.'

Most common mistake:
Inconsistency between manager's ratings and comments.

Result =
Confused employee with continued lack of clarity around expectations.

Manager Assessment - Things to Watch out For

The screenshot shows the WorkDove Manager Assessment interface for Allison Meyers. The interface includes a sidebar with navigation options: Dashboard, Company, People, Apps, Pulse, Library, Reports, Templates, Integrations, and Settings. The main content area displays the performance review for Allison Meyers, with tabs for Objectives, Goals, Core Values, Development, Satisfaction, Summary, and Approval. The 'Core Values' tab is active, showing a section for '2. Accountability' with a weight of 20%. Below this, there are sections for 'Employee Notes' and 'Coaching Notes'. The 'Employee Notes' section shows a 2-star rating and a tooltip indicating '2 Stars: Improvement Needed; Performance is deficient in certain areas. Improvement is needed.' The 'Coaching Notes' section contains a text box with a red arrow pointing to it, indicating a specific area of concern.

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My Company

Search for an Employee...

Lindsay Admin User
Human Resources Specialist

Allison Meyers
Performance Review | Annual: 2022

Autosaved at 01:51:05pm Save & Close

Objectives Goals Core Values Development Satisfaction Summary Approval

Show/Hide Employee Ratings Edit

2. Accountability Weight: 20%

We deliver on our action plans and are focused on our goals (even when we struggle to achieve desired business results.)

Employee Notes

I have learned this quarter how to balance my time more appropriately as opposed to last quarter, so I feel better in this area. I have learned about myself that I am much more willing to be held accountable when I have specific data as to why or why not things got completed. Now that I am a bit more organized, I can confidently point to the reasoning behind things slipping through the cracks or not.

2 Stars: Improvement Needed; Performance is deficient in certain areas. Improvement is needed.

Coaching Notes

I do agree that you have gotten better with your time management, however, the incident in Q2 where we missed the deadline on the Carter project must be taken into account for your rating this year. You have implemented all the process steps and tools we recommended in order to not let this happen again, so you will need to keep this up going forward.

Don't hold the "sins of their past" against them.

If they've improved and corrected the problem, move on.

Manager Assessment - Things to Watch out For

The screenshot shows the WorkDove Manager Assessment interface for Allison Meyers. The top navigation bar includes the WorkDove logo, a sidebar menu with options like Dashboard, Company, People, Apps, Pulse, Library, Reports, Templates, Integrations, and Settings, a search bar, and user information for Lindsay Admin User. The main content area is titled 'Allison Meyers Performance Review | Annual: 2022' and includes an 'Autosaved at 02:03:25pm' status and a 'Save & Close' button. A progress bar shows the current step is 'Core Values', with other steps being Objectives, Goals, Development, Satisfaction, Summary, and Approval. A checkbox for 'Show/Hide Employee Ratings' is checked. The '1. Initiative' section describes the employee's performance and includes a 'Weight: 20%' label. Below this is the 'Employee Notes' section, which contains a text box with a 3-star rating and a tooltip indicating '3 Stars: Satisfactory; Competent and dependable level of performance. Meets expectations.' The 'Coaching Notes' section is at the bottom, with a text box containing a positive feedback message. A red arrow points to the 'Coaching Notes' text box.

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My Company

Search for an Employee...

Lindsay Admin User
Human Resources Specialist

Allison Meyers
Performance Review | Annual: 2022

Autosaved at 02:03:25pm Save & Close

Objectives Goals Core Values Development Satisfaction Summary Approval

☒ Show/Hide Employee Ratings Edit

1. Initiative Weight: 20%

Responds appropriately to improve outcomes, processes or measurements. Assumes responsibility and leadership when asked. Accomplishes goals independently, with little need for supervision. Takes ownership and accountability for own performance. Seeks out and/or accepts additional responsibilities in the context of the job.

Employee Notes

I have really grown here! I have taken the lead on a lot of projects already and have realized when it's time to delegate in order to get the most out of the team. I appreciate the increased responsibility and will continue to ask how I can help the team.

3 Stars: Satisfactory; Competent and dependable level of performance. Meets expectations.

Coaching Notes

I agree you have grown a lot with having and showing more initiative in your job - thank you, and way to go!

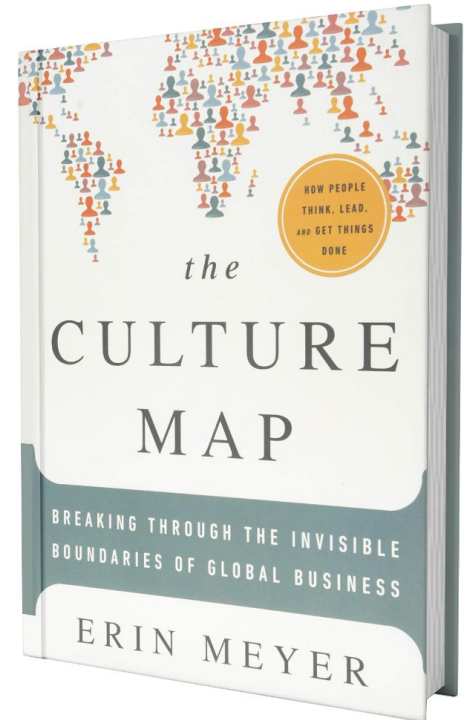
“So I’m meeting expectations and received a 3 out of 5 for initiative.”

“Great. Now what?”

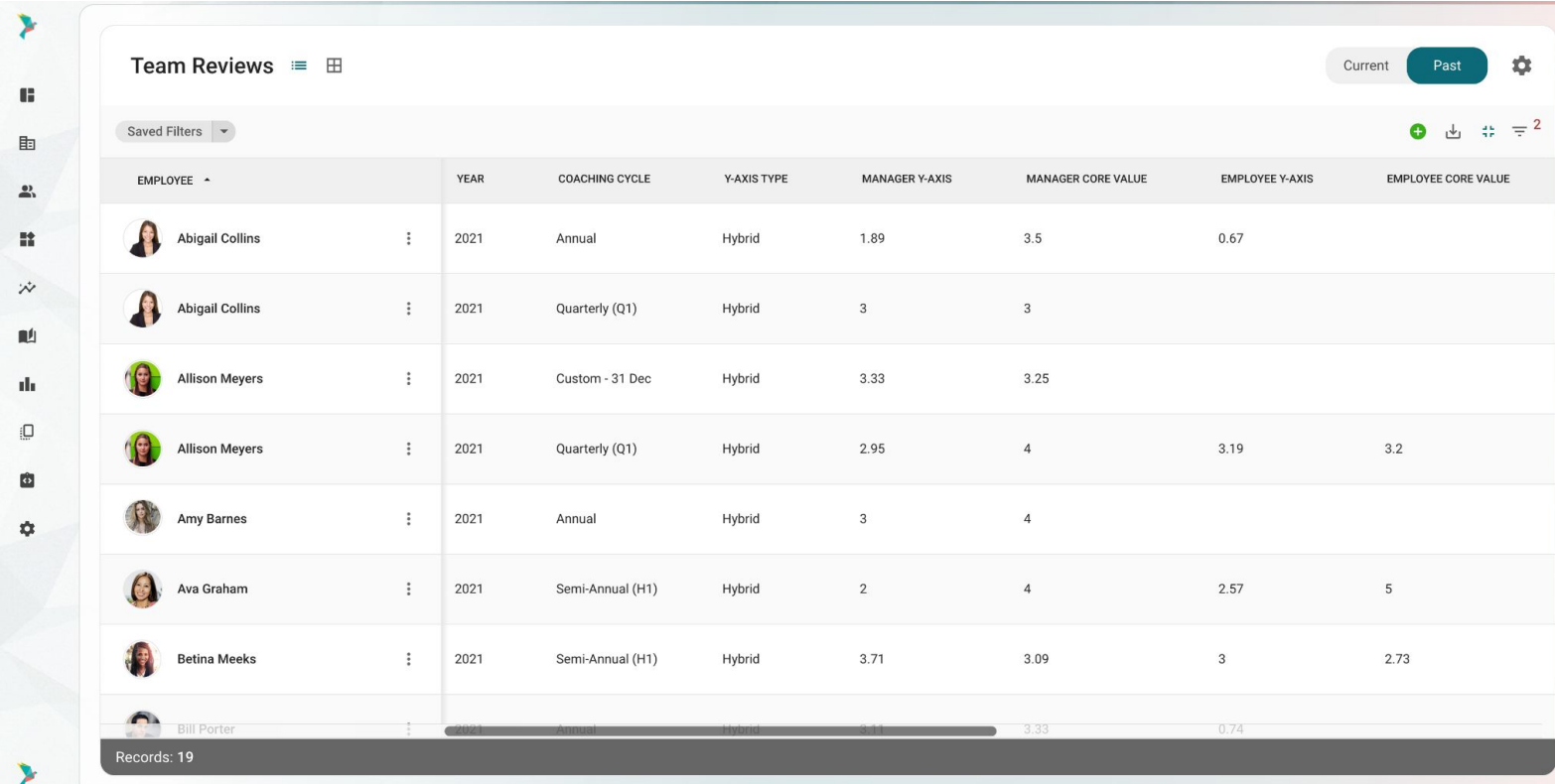
(Clarity around next steps and growth, or the ability to either maintain or achieve a higher rating, is missing).

Performance Review Talk Track

1. Read the Performance or Behavior Objective aloud.
2. Read employee's rating and rating definition (i.e. "You rated yourself 3 stars, which is Satisfactory level of performance...")
3. Read employee's comments aloud.
4. PAUSE* - allow the employee to process giving them space to provide additional thoughts.
5. Ask clarifying questions on their rating or comments if needed.
6. Read your coaching notes and add any additional thoughts.
7. Read your rating and rating definition (if different than employee's rating).
8. PAUSE* - allow the employee to process your comments (and ask any follow-up questions or comment).
9. Ensure the employee understands and is aligned (if possible) with your comments and coaching.



Next Steps - Things to Watch out For



The screenshot displays the 'Team Reviews' section in the Workdove application. It features a table with columns for Employee, Year, Coaching Cycle, Y-Axis Type, Manager Y-Axis, Manager Core Value, Employee Y-Axis, and Employee Core Value. The table lists reviews for seven employees in 2021. A sidebar on the left contains navigation icons, and a top bar includes filters and a 'Current' button. A footer bar shows 'Records: 19'.

EMPLOYEE	YEAR	COACHING CYCLE	Y-AXIS TYPE	MANAGER Y-AXIS	MANAGER CORE VALUE	EMPLOYEE Y-AXIS	EMPLOYEE CORE VALUE
Abigail Collins	2021	Annual	Hybrid	1.89	3.5	0.67	
Abigail Collins	2021	Quarterly (Q1)	Hybrid	3	3		
Allison Meyers	2021	Custom - 31 Dec	Hybrid	3.33	3.25		
Allison Meyers	2021	Quarterly (Q1)	Hybrid	2.95	4	3.19	3.2
Amy Barnes	2021	Annual	Hybrid	3	4		
Ava Graham	2021	Semi-Annual (H1)	Hybrid	2	4	2.57	5
Betina Meeks	2021	Semi-Annual (H1)	Hybrid	3.71	3.09	3	2.73
Bill Porter	2021	Annual	Hybrid	3.11	3.33	0.74	

Records: 19

DON'T
DISCUSS
COMP
CHANGES
DURING THE
REVIEW.

Scenario I - Closing the Gap on Ratings



You rated yourself 4 stars which is "exceeding requirements". The objective was to obtain 20%. Can you tell me more about your rating?

I realize now since I achieved 20%, I should have rated myself 3 stars which is "meets expectations". If I had exceeded the objective % that would be 4 stars.



You are correct which is why I rated you 3 stars "meets expectations" for this objective. Great job focusing on the process and making it more efficient in order to achieve the goal.

Scenario II - Collaborating on New Ideas



I really like how you approached Client Focus with periodic phone calls to our clients. I rated you 3 stars - "meets expectations". Can you think of other ways we can be proactive in touching our clients and helping them feel appreciated?



The written notes are a great idea and if you share what is in your heart the notes will feel personal and be great!

I think most of our clients would really appreciate a hand-written note, but I am not great with words when it comes to writing.



Effective Coaching Conversations



Always begin from a genuine place of care.

Ask clarifying questions if needed.

Acknowledgement should be both verbal and written.

Be specific.

Be aware of body language.

Assess the employee's comfort level.

Paraphrase using the employee's words.

Frame your suggestions for consensus.

Be okay with silence.

Pay attention to words.



Don't ask "Why" questions.

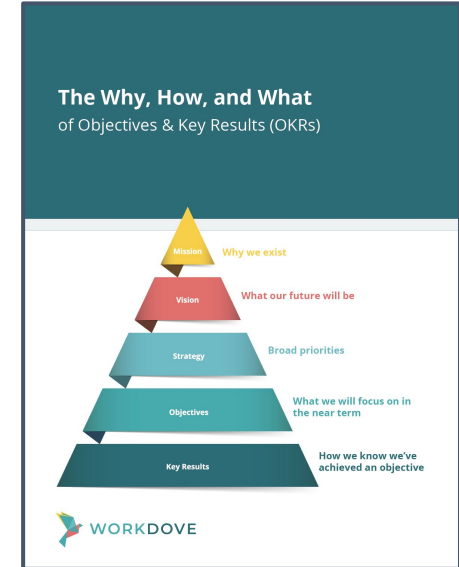
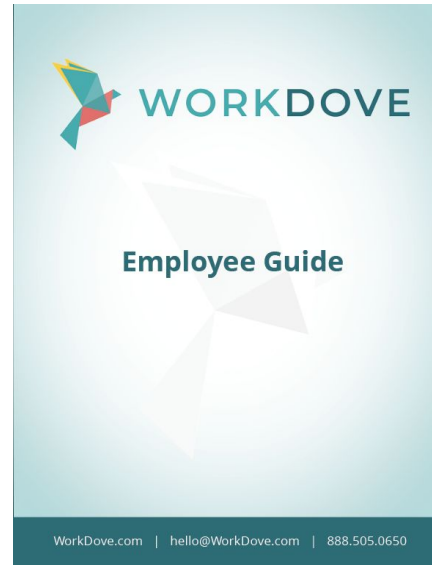
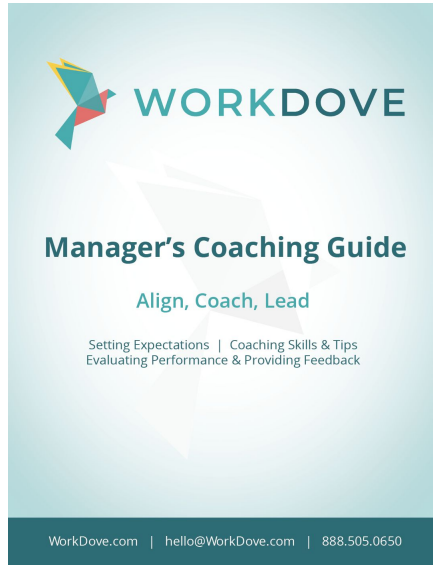
Don't get "into the weeds."

Don't rush the review process.

Don't allow distractions.

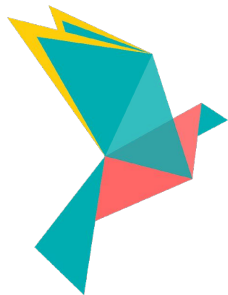
Don't use close ended questions.

Manager and Employee Training - Resources



You can download each of these guides from our website!

<https://workdove.com/guides/>



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Thank you!

To learn more and request a deeper dive
contact us at sales@workdove.com,
or by visiting workdove.com.