



DLC TRAINING FOCUS: PERFORMANCE REVIEWS

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WHAT IS A PERFORMANCE REVIEW?

Welcome to the DLC Training guide to performance reviews, designed to provide clarity and insight into what they are, why they are important and how to ensure their success.

What is a performance review?

A good performance review is a valuable experience for both the employer and employee, offering an opportunity to set goals, identify areas of growth and reflect on accomplishments. Along with ensuring that organisational aims are understood and a focus for all to be working towards achieving the same company objectives, a conversation around this can re-focus and direct efforts towards shared goals.

The purpose of a performance review

They provide a structured opportunity to hold a discussion relating to the individuals' performance, professional development, career aspirations, future of the team, organisation, and industry. In other words, a well-managed performance review, will shape the future of the individual and strengthen the organisation.

Conducted by an employee's direct line manager a performance review is an opportunity to:

- provide feedback
- evaluate goals
- define plans
- identify strengths and weaknesses
- implement improvements
- progress since the previous review
- review professional development
- improve confidence
- identify areas for development

Preparation

Whether you are preparing for your own review, or carrying out a review of others, the structure of questions will directly will directly impact the outcome. Through setting clear expectations employees will understand the purpose and objectives of the performance review and feel confident in responding and having a constructive conversation.

THE BENEFITS OF EVALUATIONS

Your review: By having a review with your manager, you will have a clear understanding of what is expected of you, what your KPIs are, and if you are on track to achieve them. You will also be able to discuss the progress of any goals set from your previous reviews. Remember that your review is a professional discussion, so prepare in advance to ensure you get what you need from this one-to-one time with your manager.

Reviewing others: If this is the first performance review you have had with this employee it is important to establish the purpose of the review, what you want to achieve and to set the tone of this being a collaborative experience. If this is a follow-up, ensure you have familiarised yourself with discussions held and goals set during previous meetings, in order to ensure this meeting accurately reflects the accomplishments and/or challenges of the employee.

How often should a Performance Review take place?

This all depends on your company and team culture. Do you have regular one-to-ones with your team members? Do they have an opportunity to approach you with feedback? Do you embrace a culture of openness and reward?

An annual appraisal is not adequate when considering someone's achievements or areas for development. They should be conducted in line with other review measures, such as regular one-to-one meetings. Who would want to discuss achievements 10 months after the event? It seems irrelevant and unnecessary. Instead, provide immediate feedback on the good and the not so good to encourage improvement and conversation.

An example of a performance review schedule could be:

ONE-TO-ONE'S	PERFORMANCE REVIEW	OKR* REVIEW
WEEKLY OR FORTNIGHTLY	QUARTERLY OR BI-ANNUALLY	ANNUALLY
A regularly scheduled catch up between a manager and their team member, incorporating discussion around what has been happening since the last one-to-one. An opportunity to discuss incidents, concerns and achievements.	A well prepared, scheduled review of goals and objectives. Ensure you are measuring agreed and actionable steps towards improvement and achievement. A structured review keeping objectives clear and achievable.	A review of performance measures, targets, outputs, results and objectives. An opportunity to look to improvements and growth. Create new objectives ensuring that individual goals are aligned with team and company goals.

FEEDBACK AND CULTURE

Responsive and effective feedback

All feedback must be actionable, specific and preferably measurable, highlighting any areas which require improvement, detailing any changes in responsibility and suggestions for how an employee can professionally develop. Documenting the performance review should be timely, any delays can lead to apathy and the feeling that this hasn't been a valuable experience. We recommend that you schedule regular follow-ups, to reinforce the objectives and address any challenges to achieving goals.

Organisational culture

Performance reviews play a crucial role in shaping company culture by fostering clarity, feedback, recognition, development, and accountability. When conducted effectively, performance reviews contribute to a positive and thriving organisational culture where employees feel valued, motivated, and empowered to succeed.

Your reviews need to be collaborative, not one-sided:

- Actively listen to what your team member is saying, responding positively
- Ensure you demonstrate measures visually, ie. in a graph showing expectations and achievements
- Compare the previous year's annual review to measure performance
- Utilise tools such as SMART and SWOT
- Think of the one-to-one's as 'check-ins' with your team

Creating a pathway to success

Reviews enable you as a manager to assess goals, measures and identify areas for improvement and more importantly to acknowledge strengths, success and achievements. Once you have identified areas which require development or updating then the discussion needs to turn to professional development, keeping skills and knowledge up to date through reading, professional membership, courses and training if required.

Management and leadership of teams can be challenging, and overall very rewarding. To develop your skills, confidence and abilities we recommend qualifications delivered by DLC Training from:





This DLC Training Focus is part of a series of useful resources, visit the catalogue [here](#).

DLC Training Focus - Performance Reviews