



DLC TRAINING: PERFORMANCE REVIEWS EXPLAINED

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WHAT ARE PERFORMANCE REVIEWS?

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.

Another key element of a performance review is ensuring that organisational aims are understood, and that there is a focus for all to be working towards achieving the same objectives.



Conversations around the ideas of performance, goals, and growth can refocus and direct efforts towards aligned goals.

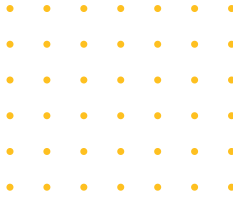
Generally speaking, performance reviews provide a structured opportunity to hold a discussion relating to the individual's performance, professional development, career aspirations, future of the team, organisation, and industry.

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, and identify strengths and weaknesses.

They can also be used to highlight and implement improvements, review progress since the previous review, and monitor professional development.

THE BENEFITS OF PERFORMANCE REVIEWS?



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“Performance management involves embracing employees’ strengths and being open to innovative ideas – even ones that change the status quo.”

Steve Jobs,
Founder of Apple

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, to ensure this meeting accurately reflects the accomplishments and/or challenges of the employee.

TYPES OF PERFORMANCE REVIEW

How often should a performance review take place?

In short, there is no “perfect” answer, and instead, lots of variables. This mainly 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 an event? It seems irrelevant and unnecessary. Instead, provide immediate feedback on the good and the not-so-good to encourage improvement and conversation.

The following table outlines the differences between one-to-one, larger performance reviews, and Objectives and Key Results (OKR*) reviews.

ONE-TO-ONES	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-ones as 'check-ins' with your team



WHAT ARE PERFORMANCE REVIEWS?



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“We all need people who
will give us feedback.
That’s how we improve”

Bill Gates,
Founder of Microsoft

As a manager, performance reviews enable you to assess goals, measures and identify areas for improvement and, more importantly, to acknowledge strengths, successes and achievements.

As an individual, reviews allow you to focus, plan, and grow.

After identifying areas that need development or updating, the discussion should focus on professional development, ensuring skills and knowledge stay up to date through reading, professional memberships, courses, or other training as needed.

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 IoSCM, ILM, and CMI.





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From our founder to our team of tutors, the experience within our organisation is unrivalled. As a student, you will receive guidance and support from these professionals throughout your studies.



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