

TEMPLATE FOR

Performance Reviews

 **corestrengths**[®]





Performance reviews can make your employees feel a multitude of ways—**anxious, skeptical, angry, and for some, satisfied.** But according to numerous studies, they don't make employees feel energized and motivated to do better work.

Only 14% of employees strongly agree that their performance reviews inspire them to improve⁴.



Leaders can't throw the whole system out of the window, and managers can't take them lightly either—or they risk their team engagement.



Employees who strongly agree that their manager holds them accountable for their performance are **2.5 times more likely to be engaged in their job².**

When done in a meaningful way, performance reviews show employees that you care about their growth and wellbeing, and they help organization's develop talent and retain their top performers.

But even the best leaders and managers miss the mark.



Why do performance reviews have to be so hard?

Every company has a different approach to performance reviews. At some places, the leadership clearly defines a few main elements—like the time of year, the list of questions to ask, and the amount of paperwork the manager needs to complete. At other places, the approach is less defined—just “do them” and let us know who gets raises.

No matter which type of organization you’re at, there is a lot left unsaid about how to conduct a performance review and the real value of it.

Most of the “dirty work” of a performance review—giving critical feedback and specific praise—is laid on the shoulders of a manager who may or may not have developed the skills to give effective feedback. Or, more importantly, may not have the best relationship or insight about the team member.

Managers may also have biases they are unaware of and limited observations of an employee’s performance. This leaves employees feeling like reviews are unfair, even when they might not be.





Only 26% of employees strongly agree that their performance reviews are accurate, and only 29% strongly agree that they are fair¹.



Then, there are managers who assume that because they work closely with someone, they don't need to sit down with them. It might feel too "formal" to schedule a review when you see and talk to someone every day.

If you're a manager and you're feeling apprehensive about your upcoming reviews—or you simply aren't sure if yours are motivating, the reasons may fall into one of these categories:

- You haven't defined a clear purpose for the reviews.
- You don't have enough objective information to give meaningful recognition or developmental feedback.
- You can't be objective because you and the employee didn't set clear and measurable goals.
- You don't have regular touch points with the individual so you have to share all new information with them. (Or, you have so many that you don't know how this conversation will be different.)
- You aren't sure how to structure this type of conversation.



- You don't have an effective relationship with the person, or you find them difficult.
- You haven't allocated enough time for this conversation or for this person throughout the year.

When you understand what makes you apprehensive about reviews, then you'll start to understand your employees' concerns, too.

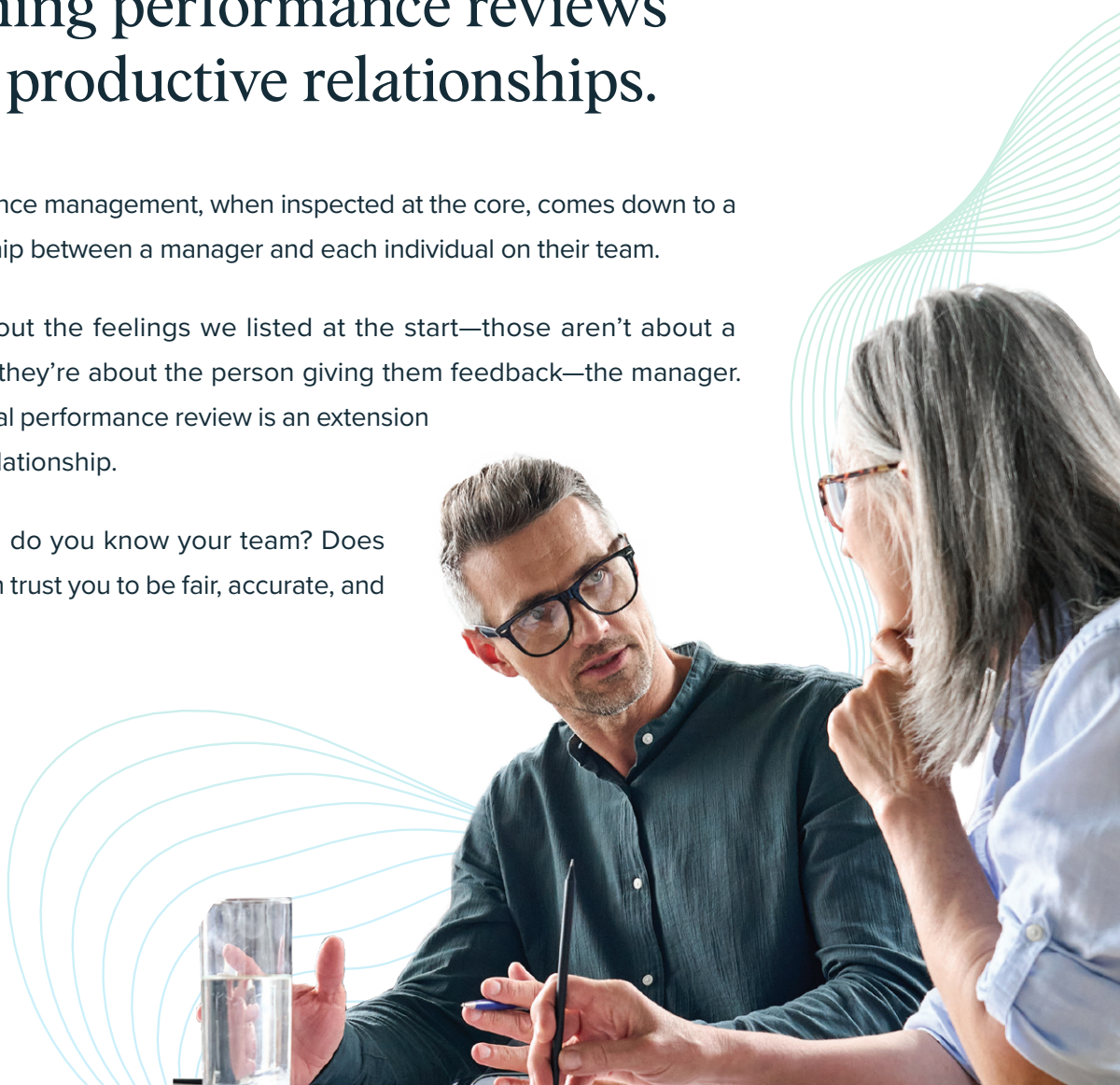
So, how can managers overcome these issues and make reviews more energizing for the individual and beneficial for the organization?

Turning performance reviews into productive relationships.

Performance management, when inspected at the core, comes down to a relationship between a manager and each individual on their team.

Think about the feelings we listed at the start—those aren't about a process, they're about the person giving them feedback—the manager. The annual performance review is an extension of that relationship.

How well do you know your team? Does your team trust you to be fair, accurate, and caring?





While relationships can't change overnight, managers can change their outlook and approach to the annual review and start building stronger relationships.

Here's 6 things managers can do—all year long and in the days leading up to a review—to cultivate a healthy relationship and review process:



Define your (healthier) purpose. Start with a (healthier) purpose.



Prepare a thoughtful agenda and schedule in advance.



Focus on relationship.



Choose your communication style wisely (with examples).



Set goals and follow through.



Create a frequency that lasts all year long.



1. Define your (healthier) purpose.

For a performance review to be successful, it needs a clear purpose. Your organization may have already defined a few “purposes” for you, but since a review is about a relationship with the manager—and each employee is different—you’ll need to define your own approach and agenda.

This starts with reframing the purpose in your own mind. You may need to “recast the past” on your previous experiences as a recipient or giver of reviews.

Recasting the past is about revisiting past experiences through a new lens; challenging some of your assumptions, adding new information, and creating a new expectation about what future performance reviews will look like.

In the past, you may have seen reviews as the time to assess a person’s value, give hard feedback, sometimes give rewards, or just chat about tactical stuff. But we recommend broadening the view to make them more meaningful—to build relationships that encourage and motivate your team.

When you see reviews as an opportunity to spend time with individuals—talking solely about them—you start to ease the tension. You can make it a time to identify what energizes and motivates them, to help them develop and grow, and to learn what their aspirations are for the future.

Most importantly, it’s a two-way conversation. The best managers invite their employees in to reflect and learn more about what’s going on with their work and lives. Managers should be asking their employees what they can do better to support them, too.



See section #2 for exactly what an employee should walk away knowing from a review.

Remember every person—and performance review—is unique. Not only will you need to reflect on the overall purpose of reviews, you'll also need to define the specific purpose of each review based on each employee and their situation.

Did the employee set goals this year? Did they have personal issues going on that affected them? Are they newer to the organization or tenured?

Your employees may also be coming into their review with past experiences that impact their expectations (and these experiences may have even been with you). This makes it critical that you reframe for them what your performance review is going to look like now.

Make sure you frame your new purpose in a way that resonates for each employee, based on their individual motivation (*see section #3 for more on this*). If the employee understands the value of the conversation and sees it as a positive opportunity for growth, they'll be more likely to be open and transparent.

This happens before the actual review—during your preparation.





2. Prepare a thoughtful agenda and schedule in advance.

Scheduling performance reviews in advance allows time for you both to prepare and for your employees to know that you take their development seriously.

When scheduling, to be sure that the review feels elevated and the employee feels seen, we recommend:

- Scheduling a few weeks in advance so you both have time to prepare and you can schedule other obligations around the meeting.
- Blocking a minimum of 90-minutes to allow time for conversation to unfold.
- Not cancelling or rescheduling unless necessary; it's one of the most important conversations of the year.
- Seeking feedback on the employee from key stakeholders a few weeks in advance to give the stakeholders time to reflect and respond.
- Communicating the purpose and sharing the agenda of the review at least one week before the meeting.
- Asking if the employee would like to add anything to the agenda.

As a manager, preparation for an agenda might take a little more time than you initially think. Remember, each person—and your relationship with them—is unique.



To prepare relationally as a manager, we recommend:

- Consider the quality of your relationship with the individual and how you can start the conversation from a place of openness and mutual trust (*see section #3 for more on relationship style*).
- Reflect on the values and drivers of the individual you are meeting with, and having a plan to adapt how you speak to their unique values.

To help you get started creating an agenda, think about where you hope to get to during the conversation for:

- The other person
- You
- The relationship
- The team
- The organization





The employee should leave the room energized and motivated by knowing:

- The way forward in their role and their development.
- How their role fits into the team and organizational goals.
- How you and others can support them.
- Why and how you value them and where they have excelled.
- Their areas needing improvement.
- That you care about them, want to know them, and support them.
- That you care enough to sometimes give difficult feedback.

Note: In your preparation you may identify a few holes or gaps in the quality of some of the other steps covered. This may change the objective of the conversation to instead creating a new starting point for future reviews and the relationship.

The best preparation for any review starts with the consideration of where you are in your relationship with the individual.

3. Focus on relationship.

Your relationships with people are built over time—but laying the right foundation for the future can start during your next performance review.

Trust + Commitment = Results

Your performance reviews will be more effective if you have relationships that are built on trust—and if you have two parties who are committed to the conversation and the relationship.



Some of your relationships may already have this, some may not. Either way, it's ideal to communicate and establish that trust and commitment are top priorities for you. That you are committed and that you want to build trust, and that you trust them.

Let each individual on your team know that their performance review is about them and that you have their best interest in mind.

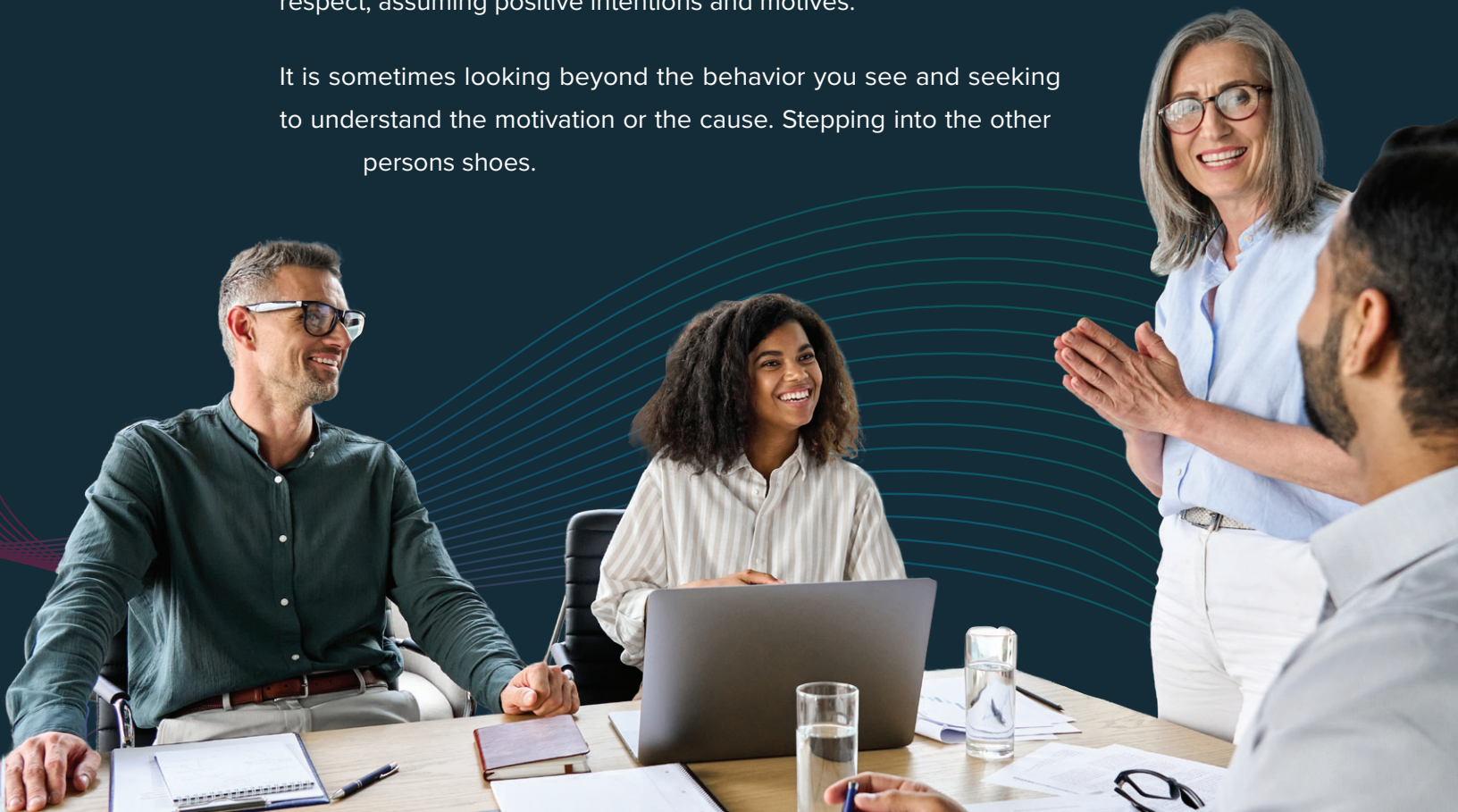
You may need to spend time with each individual recasting the past to address negative experiences with performance reviews and even your relationship with one another, too.

To put this into practice, we recommend reviewing and implementing four relationship skills that are part of Relationship Intelligence (RQ).

★ POSITIVE REGARD

Positive regard is treating people (including yourself) with dignity and respect, assuming positive intentions and motives.

It is sometimes looking beyond the behavior you see and seeking to understand the motivation or the cause. Stepping into the other persons shoes.





If you want to bring out the best in your team, you need to enter every performance review with the best possible mindset. You may have had difficult conversations or experiences with this person in the past and therefore have let go of positive regard towards them. But this prevents you both from listening with the intent to understand.

Consider: Where your relationship is now? Do you both have a positive regard for one another? How can you recast the past to put yourself in a better position to start the conversation?



SERVICE ORIENTATION

Service orientation is about creating lasting value in relationships, not only by serving others but by allowing others to be of service to you. It's reciprocal.

The performance review isn't just a conversation about what the individual can do differently; it's about what they need and want from you to help them in their role.

The topic of how you and others can support them is a key part of the conversation and shows you're committed to understanding what the employee needs—and how you, as the manager, will be held accountable to meeting those needs.

A performance review involves a two-sided contract which includes service orientation on both sides: "What do you need from me to help you in your role?" and only then "Here's what I need from you to fulfil your role."

As the manager, remember to review your side of the deal first at every review.



Consider: Do you practice service orientation with this person? Are you curious to learn what they need from you to support them in their personal development and performance?

PERSONAL ACCOUNTABILITY

Personal accountability recognizes that every person is in control of his or her choices and takes responsibility for the outcomes of those choices.

Practice personal accountability by taking responsibility for your part in the relationship and allowing everyone to be involved in and responsible for their actions, performance, and development.

In any coaching conversation (like a performance review), the best coaches and managers allow the coachee to speak more than they do. As a manager-coach, you become the facilitator, helping your team come up with their own answers which allows them to feel empowered, committed and accountable. It is also about being willing to hear about what you can do to improve in your support of them.





Consider: Are you willing to be accountable? Where are you in your willingness to empower this other person and to allow them to be accountable for their own solutions?

STRENGTHS-BASED AGILITY

Strengths-based agility is the intentional use of behavioral strengths. It is the ability to choose the right tool for the job and is most effective when it is imbued with positive regard, service orientation, and personal accountability.

This is about adapting your style to the person in front of you whilst being authentic to who you are. When you ask someone what they need from you to achieve or improve, they may say they need support, but support will inevitably look different from person to person.

Consider: What behaviors or strengths do you need from me to help get the best out of you? Which of my strengths help you the most at the moment?

To bulk up on your relationship building skills, learn more about the [Relationship Intelligence Model](#).

Relationship Intelligence is four skills... applied in three ways... between people... to improve relationships.	Positive Regard + Service Orientation Personal Accountability + Strengths-based Agility		
	Recast the Past	Master the Moment	Co-create the Future
	Shared Experiences	Present Interactions	Aligned Expectations
	Building Trust	Generating Commitment	Driving Results



4. Choose your communication style wisely (examples included).

How you communicate is an influential factor in your leadership and relationship success. Typically, we communicate based on what we think is important and what motivates us.



So-called “thriving” employees are **4x more likely** to work for a company that understand their unique skills and interests than their “non-thriving” peers⁵.

For performance reviews, it’s important to “know your audience” and communicate accordingly. It’s easier to build relationships and influence someone when you connect with them over what’s important to them.

If you want to build trust and influence, your delivery style, including the words you use, your tone of voice, and your body language, should all reflect their motivations, value systems, and preferred communication style. After all, the review is about their growth, and making them feel seen and heard.

To learn more about your employees’ unique strengths, motivations, and values, [use the Strength Deployment Inventory 2.0.](#)

For example, if you’re giving praise, emphasize the impact they made in a way that connects to their motives. Are they more driven by their desire to improve processes, to drive performance, or to care for people?

For constructive feedback—remember to extend trust and positive regard. Assure them that you understand what their motive may have been for doing what they did; that their intent was positive. But perhaps they are simply [overdoing some of their strengths.](#)



Here are some examples of employees with different personalities and tips for communicating with them:



VICTORIA

(Motivated by task accomplishment and achieving results)

- Be clear, direct, positive, and brief.
- Link to impact on performance and results.
- Deliver with energy and confidence.
 - “The project would never have happened without your focus, passion, and ability to get things done.”
 - “You have set a new standard that we will all look to measure up to.”



DAVID

(Motivated by the protection, growth, and welfare of others)

- Be soft spoken and calm.
- Link benefits or costs to the effect on others.
- Don't assume that silence or tentative responses equate to agreement or acceptance.
 - “Thank you. I couldn't have done this without your help”.
 - “You made our customers happy by sensing their needs and serving them beyond anyone's expectations.”



LANCE

(Motivated by practical analysis and establishing order)

- Be calm, clear, complete, and correct.
- Present supportable facts calmly and methodically.
- Be comfortable with periods of silence.
 - “Remain objective, logical, fair, and in control of emotions.”
 - “Your research and analysis saved us from making a serious mistake.”
 - “Your cool, level headed approach restored objectivity and saved hours of confusion.”



SUSAN

(Motivated by flexibility and adapting to other people)

- Be open and transparent.
- Link benefits or costs to impact on the team, collaboration, and innovation.
- Show that you have looked at the situation from multiple perspectives.
 - “You are a natural translator, helping us understand one another’s perspectives.”
 - “The recent decisions you made will give us a lot more flexibility in the future.”



Remember, a big factor in communication and trust is listening. The best managers approach their conversations with an open mind (not an empty mind). Be genuinely curious and listen with the intent to learn, keeping positive regard and service orientation at the forefront.

A note on how you ask questions: Some people are energized when you ask questions, and some feel inspected. Adjust the way you conduct the conversation based on this knowledge and give them permission to say if the style isn't working for them.

When you do ask questions, ask with the intention to help them reflect and grow, not to catch them out.

5. Set goals and follow through.

A large part of performance reviews should be centered around goals. It's a time to review last year's goals, but even more to align on and discuss your employees' new goals.

Specific
Measurable
Achievable
Relevant
Time bound

Goal setting should be personal and unique to the individual, including factors like a person's strengths and values, but they should also tie to your team's and organization's goals.

We recommend following the S.M.A.R.T. formula developed by Peter Drucker, but you can think broadly about what "measurable" means.

It's as important to be accountable for goals tied to quantifiable KPIs, such as time or cost, as it is to be accountable for behaviors that are tied to organizational values such as collaboration, inclusion, and psychological safety.



The employee's motivation also comes into play here. What's measurable to someone motivated by process will be very different from what's measurable to someone motivated by people.

When discussing role objectives, make sure you and the employee have a clear understanding of:

- Individual goals
- How individual goals are tied to team goals
- How team goals are tied to organizational goals
- Behaviors required to deliver the objectives
- Metrics that will measure the above
- Developmental goals
- What's required from you to support them in achieving their goals

It's also important to agree to actions from both sides and to set review dates to see how things are going. Employees disengage from a manager and conversation if they feel that what they agree to is never followed through on or mentioned again.





Preparation for the next performance review starts in the current one. Capture notes and action items at the end of the meeting and agree on what you'll review next time—before the employee leaves the room. Make sure to check understanding from both sides.

Then, schedule time in your calendar to follow through on what you said you would do, whether that's to check in with them in two weeks or to help them enroll in an upskilling program.

In the next review, the first agenda item should be asking the employee whether you kept your side of the bargain.

6. Create a frequency that lasts all year.

Frequent touchpoints with a manager are not only good for employee engagement, they're also crucial to building relationships and preparing for the annual review.

The purpose and value of frequent meetings are to:

- Get to know your employees and ensure that you're meeting their needs.
- Adjust goals as a person's projects or job duties shift.
- Address challenging situations as they occur.
- Provide regular feedback both from a recognition and developmental perspective.
- Keep notes so you don't have to rely on your memory when it comes time for the annual performance review.



Employees who receive weekly feedback are **2.7x more likely to be engaged at work⁴**.



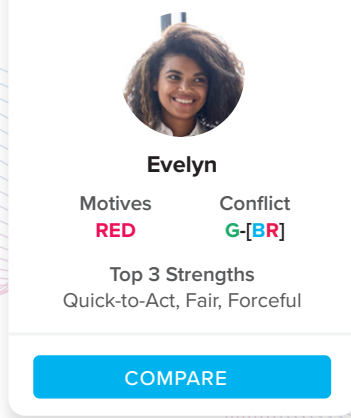
Work moves at a fast pace, and weeks and months can fly by between check-ins with your employees. If this has been the case for you in the past, now is a good time to set up your calendar for the year.

Book the next several reviews in the calendar, for approximately 1-2 hours each, at three- to four-month intervals—because 30 minutes isn't long enough to have a meaningful conversation. Then, show the employee you care about them by treating this meeting like an immovable commitment.

Between reviews, take time each week for conversations with each employee to recognize what they did well and talk about what they can do differently. The performance review will build off of these conversations.

ALSO, TAKE TIME TO CONSIDER:

- Are you giving enough attention to all individuals—especially remote employees?
- Do you know more about those you work closely with versus those you don't see very often?
- How can you get to know everyone well so you can equally support them and identify their development areas?

Evelyn

Motives **RED** Conflict **G-[BR]**

Top 3 Strengths
Quick-to-Act, Fair, Forceful

COMPARE

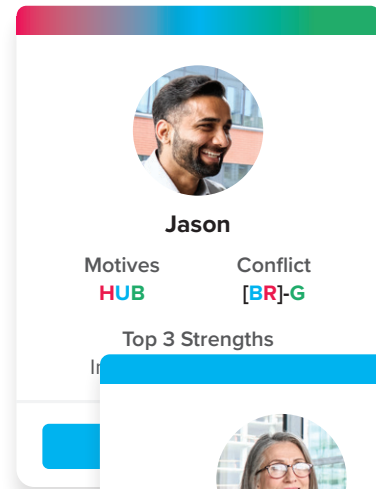
The best performance reviews happen when managers build productive relationships.

Despite an organization’s best efforts to set managers up for success during review season, one of the most crucial pieces is often overlooked—the relationship between a manager and their employee.

If the goal of a performance review is to improve your employees’ performance, you need managers who understand their employees’ individual strengths and motivations.

Core Strengths can help you conduct better performance reviews.

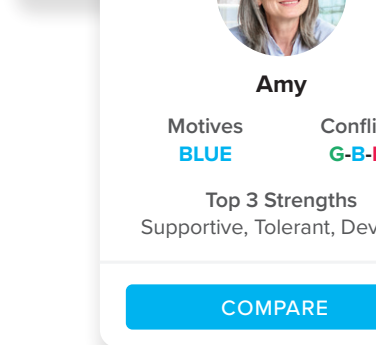
[Learn more about the SDI 2.0 assessment](#) and how it can help you understand your management style and build better relationships with all employees.



Jason

Motives **HUB** Conflict **[BR]-G**

Top 3 Strengths
Influencing, Fair, Forceful



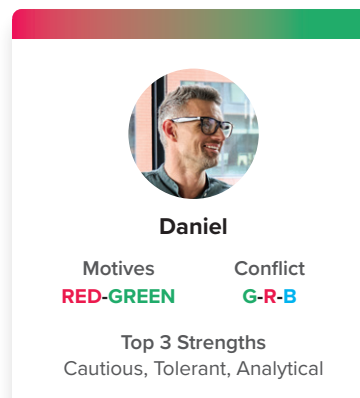
Amy

Motives **BLUE** Conflict **G-B-[BR]**

Top 3 Strengths
Supportive, Tolerant, Devoted

COMPARE

- 1 Asplund, Jim, and Ben Wigert. "11 Ways to Improve Performance Reviews With CliftonStrengths." *Gallup.com*, Gallup, 10 Nov. 2022.
- 2 Gallup, Inc. "Re-Engineering Performance Management." *Gallup.com*, Gallup, 7 Dec. 2021.
- 3 McLain, Denise, and Bailey Nelson. "How Fast Feedback Fuels Performance." *Gallup.com*, Gallup, 19 Dec. 2022.
- 4 Sutton, Robert, and Ben Wigert. "More Harm Than Good: The Truth About Performance Reviews." *Gallup.com*, Gallup, 10 Nov. 2022.
- 5 Wood, Steve. "5 Ways to Make Performance Reviews Meaningful." *Corestrengths.com*, 25 Jan. 2022.



Daniel

Motives **RED-GREEN** Conflict **G-R-B**

Top 3 Strengths
Cautious, Tolerant, Analytical

