

CONDUCTING A COLLABORATIVE PERFORMANCE REVIEW

OVERVIEW

Although the formal performance review may seem more an administrative than a management responsibility, in practice it can be an extremely powerful tool for the performance leader. Especially today, when people work more independently, few opportunities arise when both the manager and employee can step back, look at what has happened, and decide where to go in the future.

This unit provides a collaborative approach to the formal performance review. Participants will learn how to prepare employees—and themselves—for a review, how to manage expectations during the discussion, and how to create an atmosphere that encourages both people to be open about their concerns and plans for the future.

LEARNING OBJECTIVES

- Explain how a performance review discussion can be used to increase individual productivity, motivation, and learning
- Describe how to prepare the person being reviewed for a collaborative discussion.
- Describe how prepare yourself for a collaborative performance review.
- Explain the importance of identifying two to three core points that the person being reviewed should remember after the discussion.
- Set up a focused discussion by opening the review with the purpose, desired outcomes, and agenda.
- Focus the review on the future, rather than on the past.
- Use the Key Actions for conducting a collaborative performance review.

KEY ACTIONS

- Prepare yourself and the other person for a focused discussion.
- Begin the session by setting expectations for your discussion.
- Invite the person to share his or her self-assessment.
- Give your perspective on the other person's performance.
- Jointly determine next steps.
- Summarize the core points of your message.

TYPICAL TIME INVESTMENT

Time commitment varies. Please discuss with your Partnership Development Manager.

