



PERFORMANCE REVIEWS CHEAT SHEET

Writing an effective performance review can be one of the most challenging tasks for a manager. However, by following some key tips, you can master the process and write a flawless evaluation!

PLAN AHEAD

One of the biggest pitfalls managers encounter is not keeping track of an employee's performance throughout the year. This can lead to overlooking accomplishments or issues that have occurred. Managers should try to meet with employees monthly and keep a record of what they have accomplished in order to make sure everything is documented come time for reviews.

BE OBJECTIVE

When an employee has been a nightmare for the past month, it can be hard to effectively evaluate their performance for the entire year. Make sure you're giving an overall picture of the employee, not giving an overly negative review due to a recent incident. Evaluate if issues are reoccurring or have only occurred once. This is another place that keeping a record throughout the year can help- maintain a log of employee issues so that you can objectively evaluate them.

DON'T WAIT A YEAR

One of the biggest mistakes managers make is waiting until the annual performance review to address any issues that have arisen. This does a huge disservice to the employee- they can't correct behaviors they don't know are problematic! by providing effective feedback throughout the year, nothing on the performance review will be a surprise. This can help to alleviate some of the anxiety that accompanies annual reviews.

INCLUDE THESE

An effective performance review contains the following components, along with specific examples of each.

THE EMPLOYEE'S RESULTS

What did the employee accomplish? If they failed to meet a goal, why did that happen? Were there any outside factors that affected their failure or success?



HOW THE OBTAINED THESE RESULTS

What skills and unique talents did the employee use to achieve these results? Conversely, what skills might they need to improve on in the future?

PERFORMANCE SUMMARY

How is the employee doing overall? What should they work on developing? Make sure that you are objective and honest in this section particularly. A poor performer can't improve if they don't know there is an issue.

SAMPLE PHRASES

These phrases are great starting points to writing your employee's performance review.

COMMUNICATION

Communicates ideas clearly and effectively

Communicates promptly and politely both orally and in writing

Effectively expresses expectations and delegates tasks

Demonstrates polite and professional communication

Shows professional concern for colleagues

CONTINUOUS LEARNING

Continuously seeks out opportunities to learn new skills, such as [example]

Participated in [training] to develop [skill]

Demonstrates the ability to learn independently and quickly adapt to new situations

Promotes a culture of learning by [example]

COOPERATION

Readily shares expertise with other team members

Builds strong relationships with others through facilitating open communication

Encourages collaboration within his/her team

Readily assists colleagues with projects and duties, such as [example]

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CREATIVITY/INNOVATION

Seeks innovative solutions to problems such as [example]

Developed [example], which resulted in [result]

Fosters an environment of creativity and exploration of new ideas

IMPROVEMENT

Develops new and innovative solutions to improve efficiency, such as [example]

Continually plans for improvement and increased efficiency

Implemented [example], which resulted in [result]

MANAGEMENT/SUPERVISION

Provides team with support through [example]

Effectively delegates work to team members

Provides team members with the support and resources necessary to achieve their goals

Effectively manages staff members by [example]

Assists individual employees grow their skills by [example]

PROBLEM SOLVING

Demonstrates a thoughtful and efficient decision making process

Effectively identifies issues and independently develops solutions

Consistently demonstrates excellent critical thinking skills

PRODUCTIVITY

Exceeds normal output standards

Delivers all projects before the deadline

Consistently meets or exceeds performance goals

Completed [task] with [metric], exceeding the expected level of [goal]

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TIME MANAGEMENT

Consistently meets all deadlines

Effectively leads meetings by [example]

Makes effective use of the workday

Sets and meets realistic deadlines for projects

Is prompt and professional in all forms of communication

VISION

Lives out the organization's values by [examples]

Promotes the company's mission and values by [example]

Demonstrates the ability to recognise how projects fit the organization's overall vision

ADDITIONAL READING

Armstrong, S., & Mitchell, B. (2008). *The Essential HR Handbook: A Quick and Handy Resource for Any Manager or HR Professional*. Franklin Lakes, NJ: Career Press.

Falcone, P. (2005). *2600 Phrases for Effective Performance Reviews: Ready-to-Use Words and Phrases That Really Get Results*. New York, NY: Amacom.

Green, A., & Hauser, J. (2012). *Managing To Change the World: The Nonprofit Manager's Guide To Getting Results*. San Francisco: Jossey-Bass.