

# Set for Success: Evaluating and Motivating Staff Through Performance Reviews

Presented by Michael D. Haberman, SPHR



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# About Mike

- Vice President and Co-founder of Omega HR Solutions, Inc.
- Over 35 years of experience
- Certified as a Senior Professional of Human Resources and SHRM-SCP
- Author of HR Observations

# Learning Objectives

- How to evaluate employees
- Setting effective goals
- Performance review walkthrough
- Ways to improve reviews

# Importance of Performance Reviews

- Focus on the bigger picture
- Provide documentation for employment decisions
- Improve managers



# Preparing for Performance Reviews



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# Preparing for Performance Reviews

- Ask employees to conduct self-reviews
- Review your own notes on employees
- Get 360-degree feedback from other coworkers
  - Manager level or above
  - Not other team members

# Writing Performance Reviews

- Avoid generalizations
- Stick to objective information and data
- Use metrics
- Avoid discriminatory language



# Creating Effective Goals



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# Why Goals Are Important

- Give employees direction
- Outline expectations
- Set performance parameters
- Align employees with company mission

# Collaborative Goal Creation

- Gives employees ownership over jobs
- Helps develop careers
- Identifies strengths and interests
- Makes goals realistic



# SMART Goals

- **S**pecific: focused on an area or task
- **M**easurable: include a metric
- **A**chievable: realistic
- **R**elevant: tie into your business
- **T**imebound: have a deadline

# Additional Goals for Goals

- Aggressive goals must still be attainable or employees may disengage
- Incorporate company mission and values
- Create team goals

# Conducting Performance Reviews



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# Scheduling Performance Reviews

- Set aside an hour in a private setting
- Give yourself breathing room between meetings
- Send the invite a month ahead of time
- Set up reminders to send reviews to employees one hour prior to meeting

# Performance Meeting Walkthrough

- Review job responsibilities and goals
- Give employees a chance to respond to or ask questions about your appraisal
- Discuss future performance and career development
- Have employees sign a copy of the review to keep on file

# Disciplinary Actions

- Avoid taking disciplinary action during a review unless absolutely necessary
- Address issues as they arise
- Outline the steps that *may* be taken if the issue isn't addressed or changed



# Constructive Criticism

- Use specific, objective facts
- Avoid the feedback sandwich and follow the Stop, Start and Continue model:
  - **Stop** actions that hinder performance
  - **Start** taking steps to improve
  - **Continue** doing what you do well
- Focus on actions, not dispositions

# Motivation

- Follow criticism with motivation, not compliments
- Ask employees for ways they think they can improve
- Share your suggestions for improvement



# Rewarding Good Performance

- Consider separating raises, bonuses and promotions from performance reviews
- If combining rewards with performance meetings, talk about them at the beginning to set the framework for the discussion



# Improving Reviews



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# Improving Reviews

- Offer real-time feedback
- Keep notes and other paperwork on employee performance
- Conduct performance review pre-meetings to set the tone for the actual reviews
- Have performance planning meetings to set expectations
- Increase the frequency of formal reviews



# Final Notes

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# Final Notes

- Ask employees to provide written self-reviews
- Stick to constructive criticism following the Stop, Start, and Continue model
- Focus on motivating underperformers, not disciplining them
- Keep goals SMART: specific, measurable, achievable, relevant and timebound
- Discuss performance regularly

# Thank you!

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