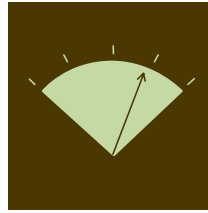


PERFORMANCE REVIEW CONVERSATIONS



CHARACTERS & BACKGROUND

The scenario takes place in the offices of a national Newspaper. Sue is a journalist and Bob is her line manager. Bob & Sue know each other well, and have worked together for ten years. Bob has line managed Sue for the past four years. They get on well, and in the past, the performance review conversations have been a relaxed affair.

Sue has been a good performer, but in the past two years her performance has slipped - as well as being less creative in her writing style, she hasn't paid much attention to developing her contacts. Bob has not brought this up in the last two performance reviews.

This year HR have introduced a new rating system, which Bob is about to use for the first time. He has not prepared well, and is uneasy about giving Sue feedback that he knows she won't like. Bob is particularly worried about giving Sue a medium rating - which he knows she will see as 'average'.

Sue knows that she has let things slip over the past couple of years, but feels she deserves an easier ride having been at the paper so long. Also - she had a few exclusives this year, has never previously had negative feedback and so her expectation is that the review and the rating will be fine.

FILM 23 | HOW NOT TO TELL A FRIEND THAT THEY HAVE AN AVERAGE RATING

Initially the conversation is relaxed and the body language is easy - they are on safe territory chatting about holidays. However, Bob becomes flustered as soon as the conversation turns to work.

He **'um's'** and **'ah's'**. He stutters, and says **'you know ...'**

He blames HR for the changes, and doesn't own the process:

'I agree, you probably shouldn't be in there.....it's just the way things have happened'.

When Sue becomes angry and asks for feedback, he is not prepared. He says that there is **'loads to work on ...'** and that she could work on her **'writing style'**. There is nothing specific in Bob's feedback to Sue.

Sue's body language goes from relaxed and open to closed - arms rigidly folded, legs crossed, face glaring.

FILM 24 | HOW DO YOU TELL A FRIEND THEY HAVE AN AVERAGE RATING?

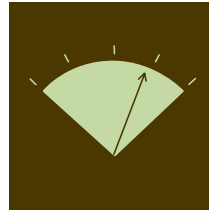
Bob looks and sounds more confident. He takes ownership of the process, and is clear about the criteria he is using for assessing the whole team.

Sue is unhappy about the rating - and pushes back at the feedback - but Bob is able to handle her challenges by using examples. For example, when referring to contacts - he says that her contacts are **'robust, but not exclusive'**, when referring to the Home Secretary scandal.

Bob acknowledges that Sue has not had clear written feedback in the past - and that he has played a part in that. He agrees to **'take it on board'**, and that he will offer Sue more support in the future.



PERFORMANCE REVIEW CONVERSATIONS

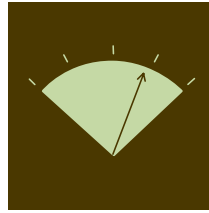


BEHAVIOURS TO ENCOURAGE

- **Owning the message**
- Giving clear feedback
- Using examples to back up what you are saying
- Being clear about the criteria you are using to assess people
- Being clear and 'professional' with work colleagues who are also friends
- Keeping calm when pushed
- Balancing the feedback with both 'positive' and 'developmental' areas
- Offering support and continued feedback
- Coming to the meeting prepared!



PERFORMANCE REVIEW CONVERSATIONS



CHARACTERS & BACKGROUND

Mary is Pete's manager. They work in a media organisation. Mary is quite new to management, and this is the first time she has done a performance review with Pete.

Pete is a corporate animal, not aggressive but will try it on, play the game. He senses weakness in Mary's delivery, and challenges back.

Mary has not prepared sufficiently for the conversation, and Pete has numerous valid questions about how the rating was decided.

FILM 25 | HOW NOT TO SET CRITERIA EFFECTIVELY

Mary appears confident - but she is ill prepared and hopes to get away with it by keeping the conversation general. She uses phrases such as **'cracking job'**, **'really good job'**, and **'great job'**, which are generic and misleading.

Mary avoids any direct and detailed feedback - in fact only alludes to **'a couple of small issues'**, but doesn't back it up. She skirts around the issue, and has no criteria and no evidence to back up the rating.

Pete senses Mary's lack of clarity, and is terrier like in his perusal of more detail. He is the one controlling this conversation.

FILM 26 | HOW DO YOU SET CRITERIA EFFECTIVELY?

Mary sets out the criteria she has used to measure performance in the team, at the outset. She refers to her notes and appears confident and prepared - open body language, clear introduction to the process, and the fact that it has changed.

Mary's feedback is detailed - eg. when discussing deadlines and the need for greater flexibility from Pete.

Mary uses evidence - eg. when discussing relationships within the team, and Pete's lack of respect for Ryan.

She also uses

silence and leaves space for Pete - which encourages him to talk about his clash with Ryan.

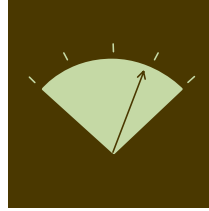
Mary also empathises - **'there are a lot of Ryan's in the business, and we were all Ryan once ...'** and **'you've been here a long time, so have I'**, which helps to build real rapport.

Mary is clear that things need to change, **'that's something you can work on'**, and **'you're going to have to work with Ryans in the future - what can you do differently?'**

Although Pete is still demanding, Mary's confidence and her evidence based feedback give him the detail he needs.



PERFORMANCE REVIEW CONVERSATIONS

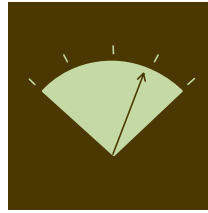


BEHAVIOURS TO ENCOURAGE

- Setting the criteria at the outset
- Coming to the meeting prepared
- Giving clear feedback
- Using examples and evidence to back up what you are saying
- Keeping calm when pushed
- Using empathy and humour
- Using silence to encourage the other person to reflect



PERFORMANCE REVIEW CONVERSATIONS



CHARACTERS & BACKGROUND

Terry and Linda have worked together for over 15 years in a Media Organisation. They know each other well and their families socialise together. Terry is Linda's line manager. He is much happier having this kind of meeting over a drink in the pub, and really struggles with the formality of the new process that he has to use this year.

Terry resents the amount of time it takes to prepare for these Performance Reviews, and finds it really hard to give his mates an 'average' rating. He is not looking forward to the conversation.

Linda has been coasting for the past couple of years - she does the bare minimum. In her defence, she has never had any negative feedback, verbal or written, and all indications are that she will get the usual 'above average' rating this year. She is a little nervous however, as she has heard through the rumour mill that the review process has changed.

FILM 27 | HOW NOT TO TAKE OWNERSHIP OF THE PERFORMANCE REVIEW PROCESS

Terry is uncomfortable - he shuffles in his seat, scratches his hair, touches his nose. Linda too is not at ease - although the conversation is friendly, her body language is closed, arms and legs crossed, and she tries to keep the general chit chat going for as long as possible.

Terry uses general 'feel good' language: **'I think you're brilliant....you're doing a really good job bla bla bla!'**
There is no evidence given to back this up.

Terry completely disowns the process:

'My hands are tied.....I didn't design this new process HR did....don't shoot the messenger'.

He colludes with Linda in laughing about HR.

Linda pushes Terry and he has no come back. He discloses information about another colleague. Linda knows she hasn't performed well: 'I haven't done amazing stories this year, but I have done good stories'

Terry fails to pick up on this - it was an opportunity to open up on feedback.

FILM 28 | HOW DO YOU TAKE OWNERSHIP OF THE PERFORMANCE REVIEW PROCESS?

Terry uses an appropriate amount of time at the start to talk about social subjects - this allows Linda, who likes this kind of 'soft start' - to feel comfortable. Terry takes charge of the conversation and moves it easily into the review.

What's interesting here is the tone Terry strikes - he sounds prepared to be clear and objective, but without sounding cheesy: **'I've may be not taken this as seriously as I have should have done'.**

He takes ownership of the process, describing it as a **'fair process'**, and saying **'I want to make it work'**. Above all, he sounds authentic.

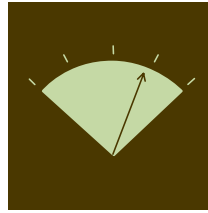
Terry is clear about the criteria he has used to measure the whole team. He asks questions, he gives clear and direct feedback: **'You have missed a couple of deadlines, it has been noticed, it has been feedback'.**

Linda is not easily won over - she still pushes back at the end of the conversation: **'I don't just want this put in a drawer until next year'**

Crucially she takes her lead from Terry - he is genuinely engaged with the process, and that has a huge impact on her.



PERFORMANCE REVIEW CONVERSATIONS



BEHAVIOURS TO ENCOURAGE

- Owning the process
- Striking the right tone - somewhere between friendly & professional, but above all authentic
- Being clear about the criteria
- Giving clear feedback
- Asking questions
- Using examples to back up what you are saying
- Being aware of using the right amount of 'rapport building' - some people enjoy it and it helps them to be
- Comfortable - others would prefer to get straight into content

