

Annual Performance Reviews: A Guide to Help You Run an Effective Meeting

Schedule a Separate Meeting

After preparing your document, schedule a quiet, distraction-free meeting focused solely on the performance review. Aim for 30 minutes to 1 hour, and ensure a confidential setting to encourage open and honest dialogue.

Open the Conversation/Set the Stage

Start with a warm, welcoming tone and create a safe space. Briefly explain the purpose of the meeting – to reflect on performance, provide support, and plan for future success.

Provide Feedback with Specific Examples

(See *Sample Performance Review Phrases (For Supervisors)*)

Offer clear, constructive feedback, both positive and developmental, using concrete examples listed on their performance review. Highlight the impact of their actions and any patterns in behavior or outcomes to create context and clarity.

Active Listening/Encourage Open Dialogue

Approach the meeting with a focus on listening. Pay attention to what the employee is saying, ask clarifying questions, and summarize key points to demonstrate understanding. Foster an open dialogue and acknowledge their viewpoint.

Clarify Expectations/Set a Plan

Reinforce role expectations and make clear any necessary adjustments to ensure alignment with Institute goals. Collaborate on setting SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound), along with clear timelines and any necessary support or training. Summarize the main points of the review to ensure mutual understanding, acknowledging that it can be a lot to absorb in one sitting.

Close on a Constructive and Encouraging Note

Wrap up the conversation with encouragement. Express appreciation for their work and reinforce your support for their growth and success.

What *Not* to Do During a Performance Review Meeting

- Do not rush the meeting or squeeze it between other tasks
- Do not rely on vague or general feedback – be specific
- Do not focus only on negatives – balance is key
- Do not interrupt or dominate the conversation
- Do not surprise the employee with new issues not previously discussed
- Do not make it personal – focus on behaviors and outcomes
- Do not skip goal-setting or next steps
- Do not end the meeting abruptly – always close positively