



Performance Assessments – Reducing The Pain

Almost all companies do performance assessments – or so they assert. For many, this is the designated time of the year, and a substantial portion of the management population would prefer 90 minutes with a periodontist. There are ways to ease the pain, and make the experience less stressful for everyone.

1. **Prepare** – List the things you want to say, and prepare to support your comments with facts. Opinions and judgements have their place, particularly when assessing business behaviours – but arbitrariness does not. Prepare for likely responses – there may be reasons for a performance gap that the employee has little control over, and you must carefully take these into consideration.
2. **Full Disclosure** – Don't judge your employees on vague expectations. Make sure your employees know what is expected of them. This means that you both must fully understand the job's responsibilities and required behaviours – not just the tasks. And it is your job to assure that your employee is fully aware of what you expect his or her job to deliver – and what he or she is being assessed on. Ideally this is set out in a complete description of the job's responsibilities, skills and other requirements (not a simple task description), but the minimum is an ongoing process of open communication to assure that everyone is on the same page, all the time.
3. **Tell The Whole Truth** - You will likely have a list of positive and a few negative assessment items. And there will probably be some areas that were fine and not worthy of much discussion. Even so – speak about all the job's responsibilities, including the ones that are working out well and attract neither specific praise nor disapproving attention. We all want to be noticed and have our work valued. And never limit the discussion to only the positives – or the negatives. Most people can handle the whole truth - they just don't like to be judged on inaccurate or incomplete perceptions.
4. **Consider The Whole Year** - Don't overly focus on the most recent event as the basis for analyzing the entire past year's performance (called the Recency effect). Keep notes during the year, and prepare before the assessment meeting. Last week's error may, in fact, have been minor compared to the outstanding project from 11 months ago. Think clearly and analyze when you are assessing results for the whole year.
5. **Make It Important** – Don't do a performance assessment in the car on the way to a meeting. Your employees need to see that you take them and their contribution seriously. Schedule a reasonable time (usually one hour minimum), and don't take interruptions. Give your employee your undivided attention and your focused interest. Would you expect less?
6. **Do It On Time** – Set a deadline and respect it the way you respect your other responsibilities. In fact, most managers' most important responsibility is to manage the people who do the work. If you don't take that seriously, what should your assessment look like?
7. **Show Appreciation – Say thanks** Your employee put in a serious effort over the year. Some things went well, a few were lacklustre. But if your employee worked hard and honestly to perform well, show your appreciation. Oh – and do it frequently during the year, not just at



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assessment time. A pat on the back and thanks, particularly for an extra effort or going the extra mile, will likely provide a huge return in terms of support and team building. Many people stay late and work on weekends, and a little overt appreciation by way of “Thanks” often has more positive impact than cash.

8. **Talk About The Future** – Review the job responsibilities and expectations for next year. Write them down, ideally in an updated job description. You and your employees need to know what is expected of them. Talk about growth, ambitions, opportunities – be honest and stress honesty from your employees. If development is needed or desired, talk about it and plan for it. Accept that some employees are not ambitious, and discuss what that means for a career path. Be honest with ambitious employees regarding what opportunities are available – in the end, we all work for ourselves and some employees will leave for opportunities that we cannot offer. That’s the way it is.
9. **Do The Paperwork** – Assessments are almost always recorded for the file, and for reference during the year. Either base the write-up on the assessment meeting, or use the write-up as the basis for the assessment meeting, with subsequent adjustments. Either way, the write-up must reflect the outcome of the meeting. And don’t leave it for a convenient time – that time will never come. Do the write-up and deliver it within five business days of the assessment meeting.
10. **Assess Performance, Not People** – Make it obvious by your discussion that you are assessing how the job got done, and how successfully its responsibilities were carried out. You are not assessing the employee as an individual, and your opinions about his or her personal non-business-related attributes are irrelevant. Stick to business.
11. **No Surprises** – Provide informal feedback continuously. This is a natural and basic part of daily management. If you are not providing coaching and constructive criticism, what are you doing? No part of the assessment meeting should come as a complete surprise.
12. **Don’t Discuss Money** – Job performance should have some influence on pay, but this is not the time to discuss (or argue) about pay. Discuss how the job got done, and limit the meeting agenda to that one topic. Leave what you are paying the employee – and adjustments, if any - to another, independent, time.

From long experience, performance assessments are never the highlight of the season. But follow this advice and things will at least be manageable. The exercise will be less daunting for everyone. For more on Performance Management see our website <http://www.hilesassociates.com/performance-management.html>.