

**Performance reviews and career conversations with your team members can sometimes get a bad reputation for being intimidating, frustrating or simply a process we HAVE to do.** And while yes, no process is perfect in every way, these types of conversations can provide a tremendous opportunity to build rapport with your team and empower them in taking ownership of their careers.

It is also a time for reflection and stepping outside of the day-to-day to celebrate their accomplishments, identify potential areas to continue to develop, address challenges/voice concerns, map out what supports and learning opportunities are needed to help them excel, and set goals for the coming performance period.

Your attitudes and behaviours are often directly correlated to the level of benefit experienced as a part of this process – so positivity, openness, preparation, and readiness are all things to focus on to maximize the impact of your conversation.

Below are some tips to help you do this:

## 1 Understand the Benefits

It's likely that you and your team are doing the best you can in the environment and circumstances you are working with. These conversations are designed to help you and your team member to work together to help them 'be better' and excel in their role. The focus is on benchmarking their performance within the team/organization, providing feedback, identifying what they need in order to be successful, and setting your short term and long term goals.

Here are a few of the benefits that can come from the appraisal and career conversation process:

- You will be able to share how you perceive your team member's performance, gain insight on their perspective and, ultimately come to agreement about where they are at in their career path.
- You will have a clear understanding of what your team member is working to accomplish in the upcoming performance period and leave with a plan to help them to optimize their performance on-the-job. This can include a set of well-defined objectives, a personal development plan, and a sense of steps they can take to work towards their career goals.
- You will have a clear understanding of supports being put into place and what you will be providing to your team member to further their development– i.e. coaching, training, mentorship, financial support for learning/knowledge building, stretch assignments, etc.
- You will have discussed and addressed challenges, obstacles, and/or relationships that might need to be addressed in order to help them be as successful as possible.
- You will have a written record that both you and your team member will sign. This is a helpful guide to review and reference periodically to ensure you are both keeping on track with your commitments and objectives.

## 2 Understand What Makes the Process 'Work'

There are many ingredients that go into this process. Here are a few of the main ones:

- **Both individuals are prepared.** You are professionals who work alongside each other every day. Treat this like any other meeting – you likely would not go into a planning session or strategy meeting without doing your homework. So, model that same behaviour coming into this process.
- **Employees are encouraged to be active participants.** Often employees think that they just have to let the process unfold. After all, you are the one in the driver's seat, right?! No. This process should not feel like it is being 'done to them', rather it is a two way street. Ask 'juicy' questions that promote dialogue, invite your team member to share their perspective on how they are doing (using concrete examples), solicit feedback on your own performance as a people leader, and seek clarification as needed.
- **No surprises.** Like any element of their role, your team member's preference is likely not to be blindsided or overly surprised by something. Performance reviews and career conversations are most beneficial when they are approached in the same way. These meetings should be a review of where things are at – so, whatever is discussed should have already been surfaced and talked about in some way. Not everyone is particularly skilled in this area. However, you can be proactive by initiating conversations, consistently providing feedback on performance, and scheduling regular (e.g. every couple of months) checkpoints to discuss his/her development and career goals.
- **Keep an open mind.** Your attitude and approach can define how a performance review or career conversation will go. Try working from a place that you and your team member are both committed to his/her success, your success, your department or organization's success, continued development and growth, and a great career for them. Avoid entering the discussion thinking it is a war that must be fought or viewing it as taking away from time on the job. In those cases, nobody wins. Especially, who this process is ultimately meant to benefit, your team member.

## 3 How to Prepare for the Conversation

Here are a few things that you can do to help you prepare for a fruitful performance review or career conversation:

- **Understand and set clear expectations about what is going to happen.** Often, the best time to clarify this is when you or your member is booking the meeting. If you are initiating the process, you will want to outline what you are seeking to discuss and ways that they can prepare for the discussion. Conversely, if they are setting up the meeting, don't hesitate to ask what your team member is hoping to come out of the conversation and how you can best prepare.
- **Take some time to reflect.** Awareness and fair assessment of where a team member is at in relation to their performance and career goals can help you in setting the tone for a mutually beneficial discussion. Because you have already thought about it and done some 'homework', you are not just reacting or going off the cuff over the course of the discussion. Rather, it is anchored in concrete examples. You can get this process started by asking

questions like: What are the key things they have contributed over the last year? What aspects of their role may have not gone as well as I would have liked? Are there any particular things I would like them to work on or continue to develop? How might I help them in maximizing their performance/realizing their career goals?

You might also want to encourage your team member to engage in some self-reflection and assessment of their own. Tools may be available through your organization to support this process. Additional assessments or having them benchmark where they are at based on the Career Map (both can be found on the my**career** website) most relevant to their role may also prove beneficial.

- **Be solutions focused.** If you are identifying areas for development, looking at a change in responsibilities/accountabilities, talking about learning you would like to see your team member pursue or projects you would like them to be a part of – be sure to come in with ideas about how these can be actioned in a realistic and impactful way. Sometimes it is easier for an employee to react to something, rather than just looking at it as a blank slate. This will also demonstrate your commitment to their goals/needs and the best interest of everyone involved.

## 4 What to Do During the Conversation

Take a deep breath... This process is a positive thing. Remember, It is not intended to be punitive, nerve inducing, or uncomfortable. Your team member is likely more nervous than you are. Do your best to make both yourself and them as comfortable as possible. Here are some suggestions:

- **Be conscious of your tone and body language.** Like any meeting or interaction with colleagues, your demeanor and tone can say a lot. Do your best to assume an open posture, project positivity, and keep your tone in check.
- **Be engaged and guide the conversation.** Remember, that this process works best when you and your team member are both active participants. Ask questions, seek clarification, and try to guide the conversation to help you communicate what you set out to in ways that are the most beneficial for your team member.
- **Focus on going forward.** You may be providing some feedback on what needs to be improved or what might have not gone as planned. In this context, rather than focusing on the negative, you might choose to focus on “How can we prevent this issue from emerging again in the future”? Together you and your team member can work from a future forward perspective versus focusing solely on what has happened in the past.
- **Ensure you are leaving on the same page.** As the meeting concludes, ensure that you both have an understanding of next steps and what you have committed to. This should be captured both orally and in any documentation that your company uses to support the performance and career development process. You might initiate the conclusion of the meeting by saying something like “Before we finish, I want to make sure we are on the same wavelength, so, can I summarize what I think has been said?”

## 5 Understand How You Will Handle a Disagreement

Sometimes, your team member will disagree with your assessment of their performance or career development. This is normal. But, it is important that these disagreements do not permeate into your day to day relationship or leave you anyone with an overly negative taste in their mouth.

Keep the following in mind when you encounter a disagreement:

- **Get specific.** Walk through your respective viewpoints again and cite additional examples where possible. This will help you to get a better sense of each other's perspective and you may find that, after seeking clarification, you are more aligned than you think. Or, at least you will have a better idea of what is at the root of your disagreement.
- **Keep an open mind.** This is a common thread to all aspects of these types of conversations. Focus on providing enough specifics so that you can also help the employee to see your perspective. Even if you disagree, you can at least demonstrate a commitment to transparency and wanting to help optimize their performance.
- **If you truly disagree...** add a note to the paperwork that your company uses to support these conversations stating why and providing concrete examples to support your case. Encourage your team member to do the same. Remind them in as calm and respectful way as possible that you are sorry that you are not reaching agreement in this process, but that your goal is to help them to be at their best in their role and in their career going forward. You will want to invite the employee to work with you to get to resolution. But, if it is not possible, you can inform them of their options and next steps – this likely involves escalating the issue together to HR or another appropriate business leader. This is unfortunate, but sometimes is in the best interest of everyone involved.

Remember, your team member ultimately 'owns' his/her career. But, you have a key role to play in facilitating their on-going development and working towards their career goals.

By taking an active part in these kinds of conversations and following through on the resulting action plans, you are projecting strong leadership, fostering a climate of engagement, and are far more likely to feel satisfied in your role as a people leader.