



# Performance Reviews shouldn't be a surprise.

Here's how to prevent that.

 Lattice + Namely 

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## CHAPTER 1

**Straightforward performance reviews come from a strong feedback culture.**

# What is feedback culture?

A feedback culture is a work environment where it is **second nature** to tell people how they're doing.

Any and all of these actions could fall under feedback:



**Compliments on big accomplishments**



**Constructive criticism after mistakes or missteps**



**Simple appreciation for consistently doing a good job.**

“

**We do what we call “feedback on the fly.” This came from the idea that you would want somebody to tell you if you have spinach in your teeth.**

**If you eat lunch at noon and nobody says anything, at 5pm you look in the mirror and realize it’s been there since lunch.**

**So we use that as an example of coworkers helping each other throughout the day.**



”

**Colleen Clark,**  
Head of Optimistic People at Life is Good

The key is having managers who are so used to giving feedback that they do it without thinking. Building this type of culture means reiterating not just how important these tasks are, but also **how much more satisfied each employee will be in the long run with their work, the company, and their career.**

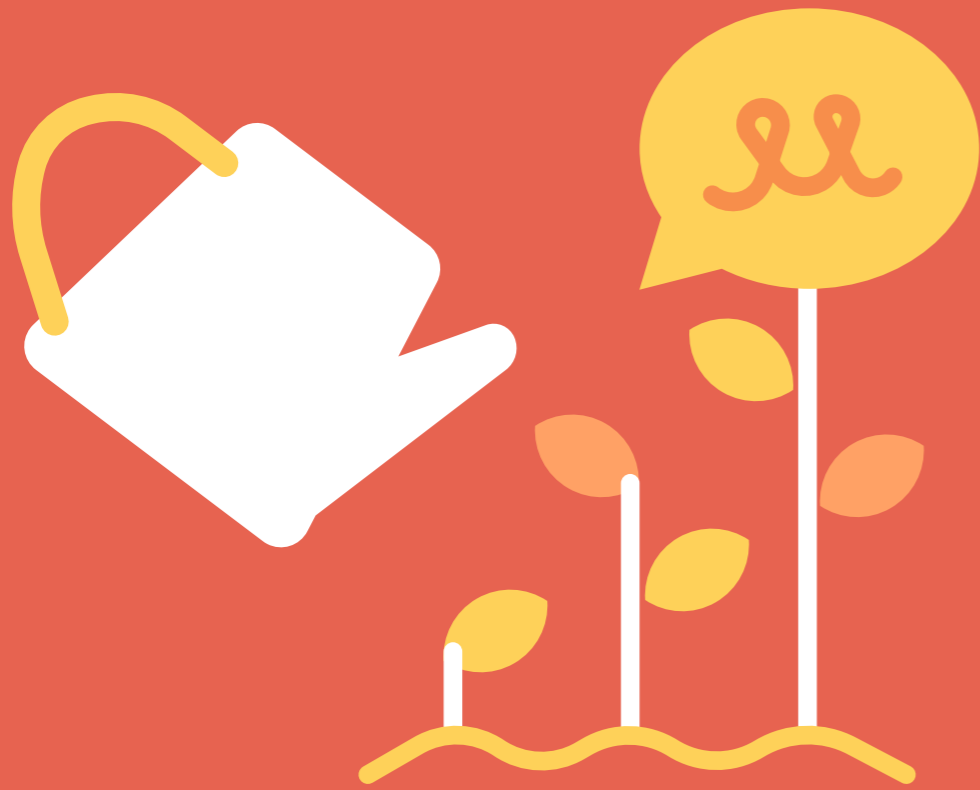
This happiness is tied up with performance management as a whole. The performance management process, especially when it comes to performance reviews, **is often seen as a slog** -- extra work just for the sake of it.

Building a feedback culture leads to a continuous performance management process -- so by the time you get to the performance review, **all the work is already done for you.**

That means by the performance review, both the manager and the direct report should already know the answers to these questions:

- 1. What did the employee accomplish?**
- 2. What did they do well?**
- 3. What did they improve on?**
- 4. What could they do better?**
- 5. Where do they want to go with their career?**

And the review is just the time they've allotted to discuss those answers.



CHAPTER 2

# Fostering a feedback culture at your company



Some questions to answer before you get started in building a feedback culture at your company:

1. What feedback should be given publicly? What should be given privately?
2. When, and through what channels, can managers give direct reports regular feedback? Slack, email, 1:1s?
3. How can managers encourage direct reports to give them feedback (also known as “upward feedback”)?
4. Finally, **are there ways the company already gives feedback?**  
That can be a great way to frame a seemingly “new law” as, “actually, keep doing what you’re already doing.”

HR can encourage leadership in fostering a feedback culture by modeling the behavior.

The executive team can start giving feedback regularly to each other, to employees, to managers. Stress to leaders that **this change doesn't have to be a big team announcement during a meeting** -- instead, feedback can be given as an aside after a meeting or in a discussion.

**Positive feedback** can be given publicly while more **critical feedback** can be given privately. Employees can also ask specifically for feedback around certain executive decisions and changes to the company. Encourage managers and employees to give honest feedback. (More on that in the next chapter.)

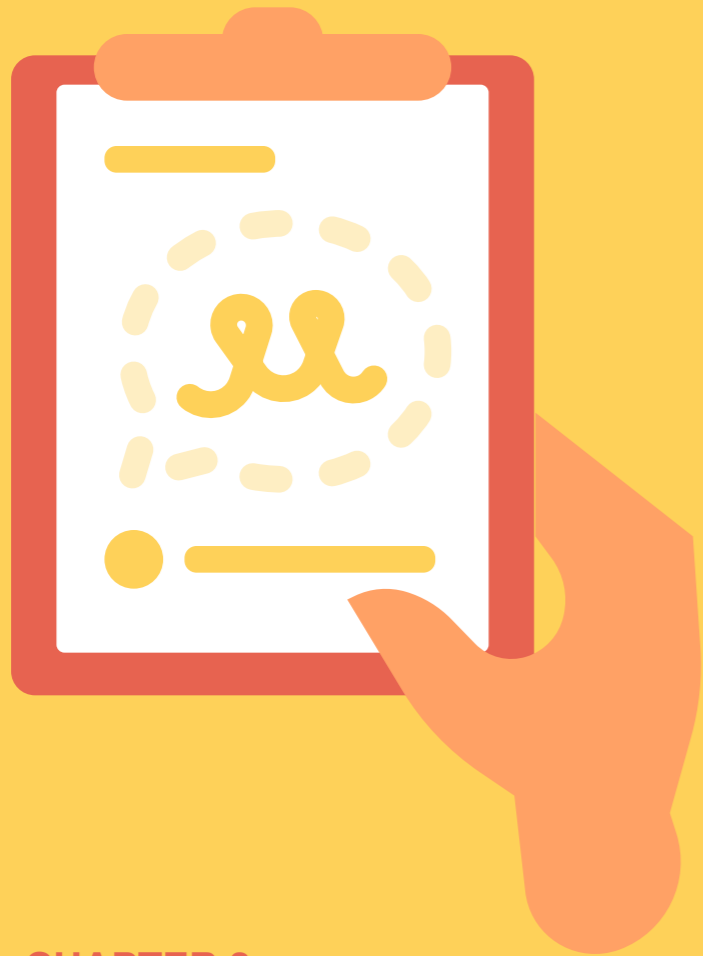
“

**We owe it to each other to point out when we're screwing up. It's the only way to get better.**

”

**Kim Scott**

Author of Radical Candor



### CHAPTER 3

# How to prepare managers and employees

## How to give feedback to direct reports

Here's advice you can give to managers about providing feedback:

### Before giving feedback...

- **Be aware of yourself.** If you're annoyed or upset, take some time to calm down. If you're nervous, remind yourself that this is in the employee's best interest. Also remember that your team takes feedback from you, their manager, very seriously, so choose your words carefully.
- **Give feedback to everyone.** It's tempting to give feedback only to "problem employees" but everyone could use feedback. Plus, this democratic approach to feedback will make everyone more open to hearing feedback -- and make them see it as helpful, rather than punitive.
- **Be prepared.** Some people get embarrassed when they get feedback. Others get defensive or upset. Remember, you're giving them feedback to help them, not hurt them.

**Give this checklist to managers when they ask about giving helpful feedback.**

## **Checklist: Giving Feedback**

Is the feedback...(All should be checked.)

- Specific?** Ex: You need to come to work on time.
- Private?** Ex: In an email or Slack message to an employee.
- Timely?** Ex: After it's become a pattern, but before it becomes a big problem.
- Positive?** Ex: The talk is not a punishment, but giving the employee a chance to do better.

**What is your intention?** (Check one or more.)

- To stop the problem**
- To give the employee a chance to correct their mistake**
- To give the employee a solution**
- To help the employee get better**

**Emphasize to managers and leadership in your company how 1:1s are a great way to schedule more holistic, ongoing feedback.**

While most feedback around accomplishments and missteps should be given quickly, sometimes an employee's problems, struggles, and work means they just need **some uninterrupted time with their manager** to discuss said problems, ask for advice, or prepare for the next project.

To run **1:1s**, you need four things:

- 1. Frequency:** Are you meeting once a week? Every other week? Make sure both your employee and you figure out how often and when you need to meet for your 1:1s.
- 2. Expectations:** What do you want to discuss during 1:1s? Especially in the first 1:1, you want to set expectations for your employee so they know what to bring up. Figure out what you want to discuss throughout the week, and encourage them to do the same.
- 3. Format:** A 1:1 should be an uninterrupted break from the normal work day, where your employee can speak to you freely about anything they're dealing with at work. Reserving a meeting room regularly works, but we also suggest getting out of the office! Go for a walk, or head to a coffee shop.
- 4. Goals:** Discuss what the employee accomplished and worked on this week, and talk to them about their future -- both in terms of projects, their time at the company, and the company itself.





Here's advice you can give to employees about providing feedback:

**Employees, ask for feedback on a regular basis.**

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**Employees, ask for feedback on a regular basis.**

**Times when you can ask your manager for feedback:**

1. During a 1:1
2. When discussing your possible goals for a quarter
3. When you've finished a project
4. When you've made a mistake
5. When you've been working to improve in a certain area
6. When you're not sure if something went well or not
7. When you're worried about how something might reflect on you

**Time you can give your manager feedback:**

1. When they ask for it
2. When you're struggling with their expectations
3. When their work style is making things harder for you or your coworkers
4. When you're unsure what the project entails
5. When they ask you to do something that requires skills you can't achieve
6. When you're burning out or just overwhelmed with work

## How to prepare for a review ahead of time

Hand these out to employees before a performance review cycle.

**How am I doing?** Some questions to ask yourself, and review.

1. What are some big projects I did well on?
2. What work have I started doing myself?
3. What work did I do in teams? How did I contribute to those team projects?
4. What are some of my biggest achievements?
5. What were some mistakes I made? How did I make up for them?
6. What were my goals this year and at what level did I accomplish them?
7. How did I react to feedback my manager or peers gave me?

Circle all and any. Remember, this checklist is for you to figure out what to write for your self-review, or to discuss in your performance review. It won't be shared with your boss or coworkers.

### What could I be doing better?

1. Deadlines
2. Quality
3. Quantity
4. Coworker and manager relations
5. Other

### What do I want to learn?

#### What would I like more training in?

1. Technical: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. Interpersonal: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. Other: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## CHAPTER 4

# The new normal performance review

Based on what happened before, how should a typical performance review go?

- **Positive Feedback**
- **Constructive Criticism**
- **Learning & Development**

And depending on the review cycle's goals, there may be a conversation around compensation and promotions.

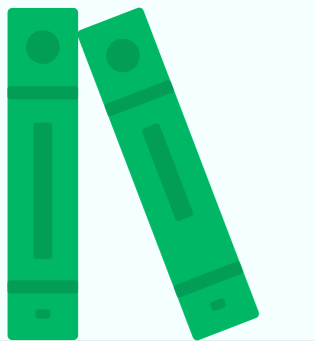
**Start with positive feedback.** Encourage managers and employees to start strong -- praise the reviewee for where they've done well or exceeded expectations. Focus on what's undeniably good about their performance.

**From there, ease into constructive criticism.** Start small, with things they could do better in things they've otherwise done well. (Try to pick small improvements for subjects that you didn't mention in positive feedback, if you can.) Then go into bigger problems, if there are any -- which hopefully there aren't, because you were able to nip them in the bud with continuous feedback. But perhaps there is some way they're struggling that coheres into a few problems. These problems should be accompanied by solutions -- maybe small adjustments or improvement plans.

**Where and how can the employee learn and develop?** In line with the above solutions, also present options or plans for ways the employee can learn and develop. Is there a new skill way they could pick up? Is there a way they could improve their working style? Suggest company-approved classes or reading materials.

**Performance Development Plans.** Sometimes an employee is not meeting their work expectations -- either in their work style or output. A PDP might be in order, but should be done after documentation or data of repeated offenses. After two warnings, a PDP should be created by the manager, articulating:

1. An evaluation of current performance in the past
2. An explanation of expected performance by a certain date (usually 60-90 days)
3. An action plan, with clear expectations and clear consequences
4. SMART (Specific, Measurable objectives that are Accurate, Relevant, and Time-bound) goals
5. Specific resources, training, and time the employee needs to meet these goals
6. Regular meetings with manager on progress of the PDP

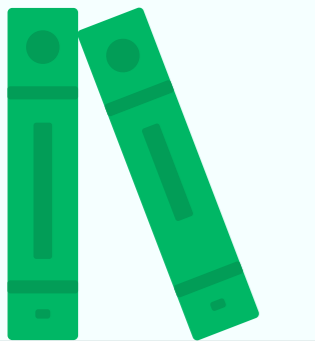




**What about compensations and promotions?** After talking about learning and developing, discuss how these can be connected to, or are already tied to, promotions and compensation.

For compensation, your company might already have a “compensation philosophy” -- that is, a strong idea of how compensation and when promotions are in order, based on how the company attracts, retains, and develops employees.

Competency libraries also determine whether an employee is meeting, exceeding, or missing the job requirements can also factor into promotions and compensation. If these are already determined, that makes the discussion during performance reviews much more transparent, so the employee and manager both know how to navigate the conversation, preventing surprise or unpreparedness on both sides.





**Our philosophy is really to make compensation not a conversation and the only way you make it not a conversation is to make it transparent, fair and generous. We created salary and equity bands that are static. We have done our market research. We pull from a number of different sources that are shared throughout our industry.**

**We make all of our offers at that band, there is no plus or minus. Then when people actually do come in and they are progressing, they know that every performance review cycle we have opportunities for people to get a comp adjustment.**



**Katelin Holloway**

VP of People Ops at Reddit



## CHAPTER 5

# The nitty-gritty: How to setup reviews at your company

## Before

- 1. Outline your overall process.** Start with feedback, encourage 1:1s, and suggest everyone in the company set goals publicly.
- 2. Get executive buy-in.** As we outlined above, the best way to get performance management integrated at your company is to have executives model it. If you can't get executives invested in performance management, you're dealing with a Sisyphean task.
- 3. Pick your tools: Google docs (for super small companies), PM software as you grow.** Keeping track of feedback, check-ins, and so on will make performance reviews even easier in the future!

## During

- 1. Company Rollout.** Determine whether this performance review cycle focused only on development, or development and compensation. Make sure your company knows which one you're doing first.
- 2. The Review Cycle.** The review should include feedback from the manager, self, direct report, and peers, with a few questions for each. Have managers sit down with their direct reports and discuss this feedback.

## After

1. **Follow up.** Survey the company on the effectiveness, efficiency, and helpfulness of the review cycle.
2. **Optimize.** Based on the surveys, make educated guesses on what to do for the next cycle, and how to prepare your company for it.

# In Conclusion

Performance reviews shouldn't be a surprise -- **but sometimes, they are.** Mainly because of opaque reviewing practices, incomplete or randomized feedback, and a lack of relationship building between manager and direct report.

**But by integrating a performance management system into your company culture,** your employees will go into their performance reviews more informed and more in tune with the company's needs, and leave happier and more pumped than ever.



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