



## SHIFTING FOCUS:

How to Put People  
at the Center of  
Performance Reviews



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## Introduction

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Let's talk about performance reviews.

They're a hotly contested topic amongst managers, employees, and executives alike—and it's up to Learning & Development (L&D) and HR professionals to make them successful. Unfortunately, today's performance review is widely unpopular.

Less than  
**1/3**

of U.S. employees enjoys the performance review process<sup>1</sup>

But the performance review is important. It offers an opportunity for impactful dialogue to advance employee careers and strengthen employee manager relationships. The performance appraisal plays a critical role in standardizing reward and promotion decisions, while encouraging employees to learn and grow.

The performance review just needs a shift to address the modern workforce.



## Introduction

It's time to make the *shift* in performance management from an antiquated one-time-per-year conversation focused on outcomes, to the continuous discussion around performance and growth that employees crave.

In the 2017 [Human Capital Trends Report](#), research firm Deloitte found that

90%

of companies that redesigned their performance management saw improvements in engagement

83%

say employees and managers are having more quality conversations



“The bottom-line question is this: How can organizations build career models that encourage continuous learning, improve individual mobility, and foster a growth mindset in every employee, year after year? This is the opportunity for today; companies that figure this out will outperform, out-innovate, and out-execute their peers.”

—Josh Bersin, Principal and Founder,  
Bersin by Deloitte, Deloitte Consulting LLP

So, grab a coffee and read our toolkit to bring updated performance management into focus.

### In this toolkit, we give you:

- 6 tips for updating performance management
- Links to top courses to help you and your people managers
- Advice from learning leaders on the front-lines of their organizations
- A conversation checklist to help managers rock their reviews



# 6 TIPS

## for performance management that employees won't hate

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Performance reviews don't need to be something employees dread. Use these 6 tips to make the shift toward a system that will continuously support and grow your talent.



## TIP 1

# Enable Real-time Continuous Feedback

The golden rule of performance evaluations is, avoid the shock factor.

Employees should have a good idea of what will be discussed before they walk into their review. On the flip side, consistent feedback helps managers gather more data, increase employee engagement, and drive business outcomes.

Ensure that managers across your organization have regularly scheduled touch-points with employees. This is usually a combination of weekly 1:1 meetings with managers, quarterly reviews, bi-yearly written reviews, and of course, the once-per-year formal review.

“It’s important to create a consistent experience, but still honor the flexibility of teams and the demands of the business. For example, you see a lot of variation between what sales does vs. engineering in terms of the timing and the cadence of reviews.”

—Cynthia Hannah, Director of Talent Management at LinkedIn



“Our goal is to ensure feedback is a prominent part of the culture at LinkedIn by making sure open, honest, and constructive feedback isn’t happening just at single point in time, but throughout the year.”

—Kyle Grubman, Senior Talent Management Consultant at LinkedIn

## HELPFUL RESOURCES:

Leading Productive One-on-One Meetings by **Dave Crenshaw**



Coaching and Developing Employees by **Lisa Gates**



Managing Employee Performance Problems by **Todd Dewett**



## TIP 2

# Encourage and Reward a Growth Mindset

Effective performance management evaluates employee contributions holistically.

Yes, key performance indicators (KPIs) are important, but the companies that outperform will also focus on an employees' ability to learn, grow, and contribute to a team.

Google [asks](#) managers to measure employee performance beyond outcomes—they want to look at how the employee achieved those outcomes. They look at the employee's ability to demonstrate company values, problem solve, execute with little guidance, and make himself or herself heard in an increasingly large organization.



## HELPFUL RESOURCES:

The Power of Growth Mindset:  
Creating a Culture of Learning  
by **Britt Andreatta**



Coach and Develop High  
Performers: Managing High  
Performers by **Sara Canaday**



**TIP 2**

## Encourage and Reward a Growth Mindset

Effective performance appraisals encourage employees to explore their career trajectory.

Not all employees will approach the subject of career growth. The organizations that encourage managers to discuss career paths regularly with employees will retain star contributors they grow into managers and leaders themselves.

“We should change our reward systems to encourage people to change roles, build technical expertise, and move horizontally for breadth and experience...The old adage that ‘you manage your own career here’ often means people managing themselves right out of the company.”

—Josh Bersin, Principal and Founder, Bersin by Deloitte,  
Deloitte Consulting LLP



## TIP 3

# Educate Your Managers

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Managers are the key to impactful performance evaluations.

Help your managers master critical feedback and compensation conversations. As an L&D leader you should feel most powerful here—you have the ability to create and curate resources to help managers thrive. Provide training on how to run a meaningful annual review ([like the template in this toolkit!](#)).

Arm managers with the inputs they need—like learning resources, career ladders, feedback they've gotten from peers, compensation matrixes specific to your organization. Perhaps most importantly you need to help managers give clear, honest and constructive feedback. Having conversations around performance and compensation is hard—especially if the manager needs to provide negative feedback.



## HELPFUL RESOURCES:

On Having Tough Conversations:  
Leadership Insights  
by **Dan Rockwell**



Discovering Characteristics  
of Effective Feedback  
by **Todd Dewett**



Communicating with Empathy  
by **Sharon Steed**



## TIP 3

# Educate Your Managers

**Research** shows that managers consider giving negative feedback one of the most difficult and stressful interactions in the workplace.

96%

of **employees** agreed that corrective feedback, if delivered appropriately, is effective at improving performance.

“We spent a lot of time sourcing great content that supported our new performance management process—for example, how to conduct a performance review, giving feedback, coaching—and created playlists with the Lynda.com courses we found on these topics. As a result, we saw an increase in the number of reviews completed and a major improvement in the quality of conversations.”

—Tania Formosa, Global Head of Talent Development at Just Eat



## TIP 4

# Set Clear Goals and Expectations

Clearly defined, measurable goals must be a central tenet of performance management.

If you're not already, have managers document individual and team goals for the quarter and the year. Annual goals should be more aspirational (e.g. sign 1,000 customers) than quarterly milestones which should be more granular and should explain how you'll get there (e.g. drive 1,000 quality leads to build pipeline to close 1,000 customers).

Many organizations look to goal setting frameworks like SMART goals and Objectives and Key Results (OKRs) to drive consistent goal setting across the organization.

### SMART Goals:

The Society for Human Resource Management ([SHRM](#)) suggests SMART Goals:

**Specific**, clear and understandable

**Measurable**, verifiable and results oriented

**Attainable**, yet sufficiently challenging

**Relevant** to the mission of the department or organization

**Time-bound** with a schedule and specific milestones



### OKRs:

Companies like LinkedIn, Google, Walmart and Target have turned to OKRs to measure employee goals.

### The formula is:

I will \_\_\_\_\_ as measured by \_\_\_\_\_.

### OR

I will (Objective) as measured by (Key Results).

**Objectives** are usually qualitative goals (e.g. increased brand recognition).

**Key Results** are a series of metrics that show that you've met that goal:

- 3% increase in unaided brand awareness
- Reach 2,000 Twitter followers
- Increase new site visitors by x%

## TIP 4

# Set Clear Goals and Expectations

### Learning Goals:

Set learning goals as part of your quarterly metrics. Identify and document a learning plan based on places the manager and employee see room for improvement.

This could be reading a few articles per week on the subject, interviewing colleagues, watching courses on an eLearning platform, or attending a classroom training. The manager and employee should meet regularly to discuss progress on learning goals, improvement milestones, and employee learning's connection to overall performance.

“When you only measure and look at outcomes, you essentially create a competition culture. Employees tend to ‘stay in their lane’ and focus on their strengths. They think, if I take this risk and don’t hit my outcome, then this is not worth my time. Outcomes are important, but make that 70% of the score, and have learning and growing be 30% of the score.”

—Dr. Britt Andreatta, L&D consultant & top LinkedIn Learning instructor



## HELPFUL RESOURCES:

Setting Team and Employee Goals by **Mike Figliuolo**



Setting Employee Goals: Management Foundations by **Britt Andreatta**



This Company’s Employees Use Lynda.com More Than Any of its Peers. Here’s Why →

## TIP 5

# Give Your Team the Tools and Technology to Succeed

Provide the tools and technology your managers need to collect data, and communicate and learn about the performance review process.

**Provide a central hub for information:** Managers are busy. Provide one central place where managers can find what they need to learn about the review process, document feedback, and stay on schedule. If managers need to put too much effort into finding what to do, they likely won't do it—or won't do it the way you want them to.

**Collect and document employee performance:** Employee reviews should be a year-long process. Provide managers with the tools they need to formally document employee feedback—scheduled or unscheduled.

For example, GE implemented an app that allows employees to request feedback from managers. It provides summaries of employee goals and any notes that managers or employees have around those goals.

While you may not have an app dedicated to your performance management, there are tools like Workday that can help you document employee feedback.

**Gain access to expert learnings:** Point managers to eLearning platforms like LinkedIn Learning to help them gain confidence at review time and as a resource to recommend to employees to support their development in key areas discussed in the review.



“Give your managers the tools and resources they need to feel supported and empowered to own the process. Build a combination of internally created content so that it feels and sounds like the company, along with external skills content.”

—Tania Formosa, Global Head of Talent Development at Just Eat



## TIP 6

# Invest in a Robust Communications Plan

Invest in a communications plan to get your managers and employees psyched up and focused on performance reviews.

This is your chance to put on your marketing hat and get creative. Think about the different communication mediums available. Email marketing, physical desk drops, posters, bulletins on monitors throughout the office, all-hands meetings, external speaker events, a pancake breakfast—these are all fair game.

Leverage your internal influencers and partners. HR business partners should be at the top of your list. For each company-wide communication you send, have your HR business partners follow up with a more personal note to the teams they work with. Get managers' attention and buy-in by sending emails from your executive team.

“Having a robust communications plan to start the performance review cycle sets us up to reach every audience where they are with the information they need when they need it. We can certainly develop world-class content, but if we don't market and communicate it well, the support won't be as impactful.”

—Kyle Grubman, Senior Talent Management Consultant at LinkedIn



## HELPFUL RESOURCES:

Setting up Internal Marketing Programs: Create a Go-To Market Plan by **Deirdre Breakenridge**



Project Management Foundations by **Bonnie Biafore**



## Conclusion

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Performance management is a central tenant of talent development.

While the one-time-per-year performance review is becoming a relic of the past, we're seeing a surge of real-time regular performance feedback about more than just metrics.

The modern performance review is about the employee, himself or herself—not just outcomes. Use resources like these to help your performance management shift toward a system that continuously grows and supports your talent. Your managers and employees will thank you for it.



# Performance Review Template for Managers

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How to lead a productive evaluation



## PERFORMANCE REVIEW TEMPLATE FOR MANAGERS

# How to Lead a Productive Evaluation

### Focus on the Work

Invite your employee to share their perspective on their performance

Dig into big wins on specific action items and talk about ways to improve

Speak to the objectives and key results (OKR)s agreed upon early in the year

### Recognize Strengths

Speak to the employee's most significant accomplishments this year

Talk about ways in which the employee embodied company's values

Tell the employee about the positive feedback you've heard from other team members

### Observe Emotions

Be mindful of any emotions or strong reactions that come up

Listen with compassion and empathy and continue to own the message

### Follow Through

Maintain momentum. Schedule a cadence for regular conversations in 1:1s or quarterly reviews

Work together to build a development program. Define key actions to help the employee overcome obstacles and grow in his/her career

### Communicate Challenges and Identify Opportunities

Invite the employee to share thoughts on challenges they've faced

Name the challenges you've seen the employee face. Reference specific projects or patterns.

Focus on opportunities to overcome challenges and encourage reflection. Point to learning resources to help them overcome those challenges

## Pro tips from Todd Dewitt

Educator, Professional Speaker,  
Top LinkedIn Learning Author

### BE SPECIFIC

Point to specific moments in time that lead you to provide your feedback.

### OWN IT

Show respect and earn respect by owning the feedback you give.

### DO A FEEDBACK CHECK

Be sure the employee can communicate in their own words that the message was received.

Watch Dr. Dewitt's course:  
Performance Review Foundations



# LinkedIn Learning

LinkedIn Learning is the only learning platform designed to meet the needs of modern learners and the demands of modern business. Combining Lynda.com's industry-leading library of expert-led and loved courses with unique LinkedIn insights from over 500 million professionals, LinkedIn Learning makes it easier to get the right content to the right learners at the right time, and help your people engage, learn, and succeed within your organization. In fact, 63% of professionals were able to apply what they learned from LinkedIn Learning within one week.

For more information, visit [learning.linkedin.com](https://learning.linkedin.com)