

grow with
RALLY HOUSE



CONDUCTING REVIEW CONVERSATIONS





Conducting Reviews

Expectations

The expectation is to offer dedicated time with a face to face conversation, to discuss the individual performance. During these conversations, leaders should strive to inspire, grow or clarify, while actively listening to support the needs of each team member.

Inspire Higher Performers

- Encourage and challenge them

Grow Middle Performers

- Develop and engage them

Clarify with Lower Performers

- Set expectations and manage performance

Successful Review Environment

In Person

Reviews ideally should be in person. Be thoughtful when picking a location to conduct the review. If you choose a public location ensure you arrive early to prepare and find a private, quiet, comfortable space.

Location: Plan for 45 minutes to 1 hour max

- Provide the agenda in the Calendar Invite with **location** included sent to each team member.
- Uninterrupted time; supply your team with a "Who to Contact" to utilize while you are conducting reviews to provide undivided attention to the reviewee.
- All Alerts turned off of all devices

Materials: You will need to share an electronic or printed copy of the performance review. Be prepared to send the review to the team member so that they can acknowledge and add comments and submit.

Virtual

A virtual Teams Review should only be conducted when travel or time due to quantity of reviews being delivered does not allow for an in person experience.

Plan for 45 minutes to 1 hour max

- Agenda provided in the Calendar Invite
- Send an electronic copy of the materials listed above
- Uninterrupted time; supply your team with a "Who to Contact" to utilize while you are conducting reviews
- All alerts turned off of all devices



Conducting Reviews

Review Period

Review Agenda

Prior to the Review Meeting

- Review the document to prepare. (10 mins)
- **To Start the Review** share the review documents with the team member(20mins)

START

Opening Statement

This review period is over your last years performance. We will cover your results for each core competencies during this timeframe, which may include metric results to support the rating.

- Review an overview of the assessment scale
- Walk them through the review and feedback
 - The goal of the conversation
 - Reality of the performance
 - Options and way forward for improvement where necessary
- Encourage questions and 2-way dialogue; ask and allow them to share their own thoughts and feelings. (10 mins)
 - Discover future goals and ambitions
 - Ask for feedback and discover how you may better support them.
- Before ending, ask for them to summarize how they have grown over the past year, and what 1 to 3 growth opportunities they have for the future (5 mins)

FINISH

Closing the Review Comments & Acknowledgement

- Add any feedback or goals discussed that were not outline in the completed review.
- **End by thanking them for their contributions and efforts**