## Start

1. Whiteboard: What do you want to cover/get out of this?
2. Ground rule: everyone OK if I avoid the volunteer dance and just choose people?
3. Agenda: approach it from the flow of the meetings itself, with deviations for certain skills that apply.

## Preparation & Writing the Review

1. Gathering information
   1. Your own notes
   2. Prior reviews
   3. Prior managers and dotted lines
   4. Employee input [**Handout**: Email templates]
2. **Video**: [Writing the review](https://www.linkedin.com/learning/performance-review-foundations/writing-the-review) [*4 min*]
3. Anticipate contentious instances
   1. Is a 3rd party needed?

## Beginning

* Share what you’ve done to prepare
* Particular meeting agenda
* Philosophy
  + Show that your goals align. e.g.:
    - Really driven people want to know what success looks like and how they’re measuring up.
    - I’ve found that the main outcome of reviews done well is to reduce uncertainty.
  + What this is and what it isn’t
    - Isn’t: A time for me to nitpick. We all do things differently.
    - Is: Celebrate your strengths and develop plans to capitalize on them. Recognize what obstacles are getting in the way of your success and what each of us can do to remove them.
      * (Above phrasing leverages locus of control cognitive biases: Fundamental attribution error and Self-serving bias)
  + What I’d like us both to walk away from this meeting is…
* Questions?
  + Encourage participation
* **Video** @ 4:10: [Setting expectations for the meeting](https://www.linkedin.com/learning/performance-review-foundations/setting-expectations-for-the-meeting) [*2 min*]
* If up for it, deliver comp.
  + Know your person
  + Works best with good news; get it out of the way so can focus on what matters.

## Performance

* For this class, going to focus on discussions around poor performance, as I don’t think anyone here’s too worried about delivering good news!
* **Video**: [Managing poor performance](https://www.linkedin.com/learning/management-tips-weekly/managing-poor-performance) [*3 min*]
  + Not everything’s worth addressing. This is not a criticism session, so avoid detailing every mistake an employee has made and don’t dominate the conversation.
  + Focus on the issue/behavior, not the person; keep the discussion centered on how to solve the problem at hand.
  + It’s about finding root cause (this is why it's a dialogue)
  + Is it a lack of ability or lack of motivation?
* Tough Phrasing
  + **Whiteboard**: What are some tough messages you have to deliver?
  + **Handout/Activity**: Tough Phrasing
  + Don’t skirt around areas requiring improvement. An annual review isn’t worth much if employees leave unaware of exactly where they need to improve their performance.
* **Video**: [Demo cont’d](https://www.linkedin.com/learning/performance-review-foundations/discussing-performance) [*10 min*]
* Balance discussion vs. structure
  + Assessment was complete before you entered the room; primarily, stay on track. Difference between conceding and acknowledging.
  + Think of the interaction as more of a question-and-answer session, in which you’ll ask employees how they believe they’re performing and what they need to improve.

## Development

* **Handout**: Goals and Development
  + Quantity expansions: Any time you simply expand existing responsibilities, you’re taking time away from other kinds of development
  + Lateral expansions (new work/tasks at similar levels)
  + Horizontal expansions (new higher-level duties)
  + Stretch Role; Committees, special projects, high-profile/visible deliverable
  + Good supplemental videos (not during workshop):
    - <https://www.linkedin.com/learning/performance-review-foundations/coaching-employees>
    - <https://www.linkedin.com/learning/performance-review-foundations/discussing-stretch-opportunities>
  + Classes (online, seminars, certification programs, continuing ed at universities)
* Up to you to model the safe parameters of discussion
  + Can they talk about wanting something outside of the company? Outside of the department?
* Adding depth to the conversation
  + Active listening
  + Prompting questions
  + Follow-up & clarification questions
    - “why do you say that?” “why does that interest you?”
    - When in doubt as to a good follow-up question, use some variation of “why” + [did you answer in that way]
* **Activity**:
  + Young employee who doesn’t have a good idea of what they want
  + Young employee who can only think in context of DHC roles
  + Ambitious early-to-mid-level employee who wants to be VP of Sales
* What their role is vs. what yours is

## Goals

* Context (company, team)
* Things to consider – up to you (the manager) to balance these
  + Employee’s capability
  + Development needs
  + Opportunities for higher levels of responsibility (lateral or vertical)
  + Baseline performance trend
  + Employee’s aspirations
  + Team’s needs
* Them first, then you
  + Agree and praise when their ideas are aligned with yours
  + As you share, talk through your reasoning; develops their critical thinking skills and further aligns them with you
* Reference back to previous sections. Ask *them* what their ideas for how to tackle gaps might be.
* Buy-in
  + Are these reasonable? Are they attainable?
  + Scenario in which you feel successful, but haven’t hit these?
  + How are we going to follow-up on these?

## Closing

* Return to and clarify parts that “don't feel right”
* What each is walking away with? What’s in who’s court
* Short Q&A
* State what just completed, state next steps & timeline, what signing means
* Set deadlines: comments returned, follow-up

## Wrap Up

* Back to whiteboard. Did we cover everything?
  + If not, address.
* Handouts
  + **Handout**: Checklist/cheat sheet
  + **Handout**: Biases and distortions
* Reminder of office hours (& Intranet FAQ)