The Ohio State University

Delivering Performance Reviews Virtually

Updated June 2, 2020
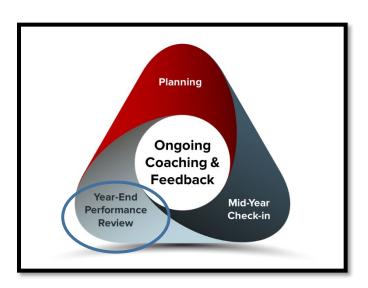
THE OHIO STATE UNIVERSITY
HUMAN RESOURCES

Delivering Performance Reviews Virtually

Discussing accomplishments to goals is one of the most important conversations between a leader and an employee. These conversations can be rewarding and sometimes difficult in person, but when you add the virtual dimension, the experience can be very different. Leaders should take this opportunity to create an exceptional experience during this conversation.
In this context, virtual is defined as not-face-to-face, and so may include a phone call (audio only) or some sort of video call (Skype, Zoom, FaceTime, WhatsApp, etc.). If possible, have this discussion via video to connect more personally during the discussion. This discussion should not be performed by texting or text-chat.

The culture at Ohio State is primarily in-person, so having this discussion virtually will be a new experience for most and may be uncomfortable and awkward for both people. This is normal for anything you have not done before and may be even more stressful due to the importance of the conversation. Remember, this is a two-way conversation and a kind of conversation that you and the other person have likely had before. Follow this guidance to make delivering and receiving a virtual performance evaluation easier and more effective.

Below is a basic outline for preparing, conducting, and following up on a virtual performance review. You will also find resources to assist with performance review conversations and virtual delivery, and professional development resources to support managers and employees.

Prepare Yourself (and if appropriate, the other person):

- o   Ensure the documentation necessary is complete.
- o   Send it (if appropriate) to the person being evaluated, via email a day or two before your call.
- o   Confirm the call/appointment either in the morning, or the day before for a morning call.
- o   Ensure you know what you want to say, what you would like to ask, and that you are centered and calm, and free from distractions
- o   Set the other person at ease by being friendly.
- o   Have an agenda, so you know where you are going in the conversation – share it verbally with the person being evaluated.

> o   When you meet with the employee, spend time on the positive aspects of his or her performance. In most cases, the discussion of the positive components of the employee's performance should take up more time than the "negative" components.

Test the Technology:

- If you are using a video technology, which is preferable, for this meeting, make sure you have the necessary software installed and that you know how to use it.
- Practice with a colleague or friend to ensure it works and you know how to use the controls.

Tips for performance conversations

The content below is written for the leader but can also be useful to the person being evaluated. For those being evaluated, think about what questions you have, the areas where you think you have excelled, where you might improve and what your organizational contribution has been. In getting feedback, listen for the desired behaviors and why they are important, and if this is not clear, ask.

- **Ask Questions** – In the spirit of the two-way conversation, be sure your preparations include a few powerful questions to encourage dialogue and invite your employee to share their perspective. A good question can prompt, broaden, or deepen a conversation so be sure to have some written down.

- **Areas of Excellence** - Performance reviews should reiterate both areas of excellence and opportunity. It is important that you highlight the achievements made and the positive impacts of their talents. Make a list beforehand as remembering these strengths when juggling a new format could be challenging.

- **Framing Feedback** – Feedback should focus on behavior, actions, and how to learn from a situation in order to move forward. To ensure feedback is based on observation and not blame, use the what-what-why framework. What did you observe? What is the preferred behavior? Why is this shift important?

- **Know Your People** – Preparation for any performance review should include reflection on your employees' talents, motivators, and coaching preferences. Remember, what we contribute best is often what we need in return. Receiving feedback in these areas will be even more difficult to hear.

- **Organizational Contribution** – This is a great time to remind your employee how their role contributes to the unit or organization. In times of significant change, it is important for each individual to know their work matters and is contributing to the core mission of the university, even from their home office.

During the Conversation

Communicate Clearly:
- <u>Slow down</u> – speak a little more slowly than in-person (practice with someone so you do not sound uncomfortable or stilted). Nervousness will cause your tempo to speed up so this is important.
- <u>Pause</u> after making a point; if you need to think before you respond to something the other person says, just say – "Let me think about that for a moment.", so they know you heard them.
- <u>Smile</u> a little more than usual – it is often difficult to read body language in a virtual environment, so smiling warms up the conversation. Starting the conversation with a question about their wellbeing can ease anxiety.
- <u>Listen carefully</u> – Listen to what is being said; breathe if you get nervous. When there is an important point you want to ensure you understand fully, repeat it back to the other person and ask if you got it right.
- Be willing to <u>ask for clarification</u> if you do not understand something, did not hear something, or are otherwise confused – remember this is a conversation, not a monologue.

Suggested Talking Points:
- Thank you for taking the time to review your accomplishments over the past year and for the work that you have done.
- I would like to spend the next 30-45 minutes focusing on you.
- The purpose of this conversation is to help you develop and grow. In addition, I would like to end our conversation with a shared understanding of where you have been and how you have accomplished the goals that were developed.
- Let's start by having you talk about what has been your greatest accomplishments over the past year. What have you been most proud of?
- What are some areas where you believe you have an opportunity to develop for the upcoming year?
- I would like to share some observations about your accomplishments and some areas for development as we move into the next year.
- What can I do to help support you next year?
- The next time we meet, we will discuss your goals for the upcoming year and how we will develop you to meet those goals.
- Do you have any questions?
- Thank you for taking the time to discuss your accomplishments and areas for development and for your work this year.

Follow-up:
- Thank the other person at the close of the call and in an email.
- In an email sent afterward:

- o   Thank the other person for their participation and thoughtful feedback.
- o   Capture your essential understanding of the conversation and outcomes, especially if goals for the coming year were discussed.
- o   Clarify any next steps and associated timelines.

Resources for performance management and virtual reviews

- 5 Tips for Conducting Effective Virtual Performance Reviews (Remote.com)
- Conversations of Performance Management
- Find tip sheets on encouraging active participation in review conversations and conversation starters as well as a brief performance management course. Gain resources and tools for the four critical conversations managers and employees should have throughout the year: Plan, Develop, Feedback, and Review.

Resource for virtual meetings

- How to make virtual meetings work (Emerald Works)

Resources for managers to engage and develop employees

- Find a variety of resources to support you as a manager on the Manage Your Employees pages in Gateway to Learning: https://gatewaytolearning.osu.edu/leadership-development/manage-your-employees/

Resources on professional development for all employees

- Plan your professional development in partnership with your manager using the Manage Your Performance pages in Gateway to Learning: https://gatewaytolearning.osu.edu/professional-career-development/manage-your-performance/