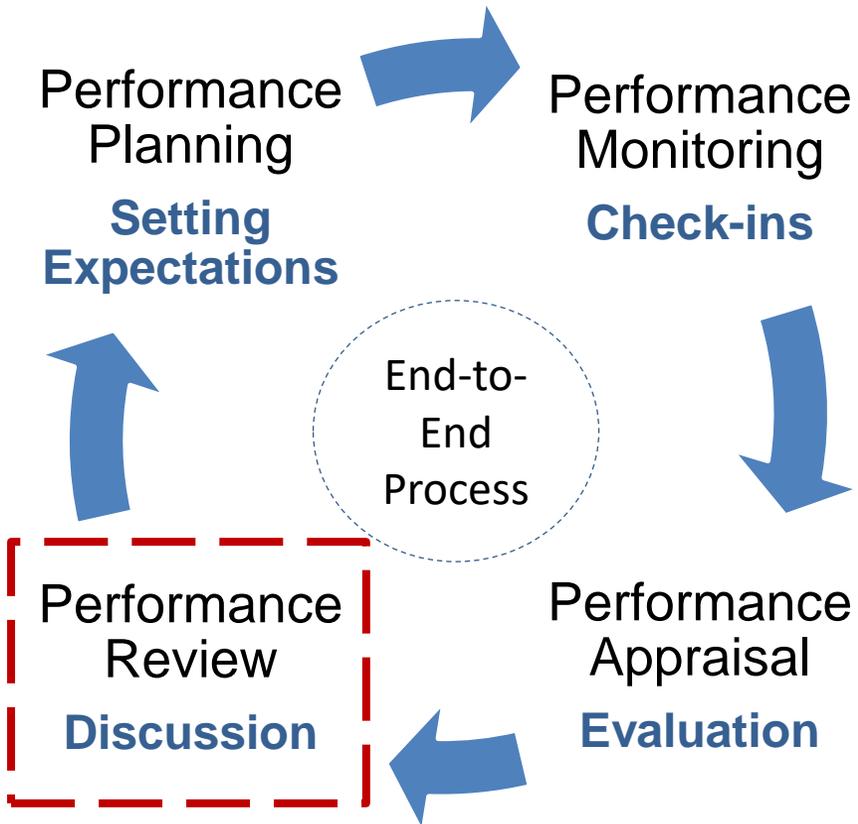


Manager Guide: Delivering a Year-End Performance Discussion

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The Performance Management Cycle



The fundamental purpose of Performance Management is:

- To set and align objectives, performance factors and development
- To provide feedback on established expectations
- To create a basis for salary recommendations

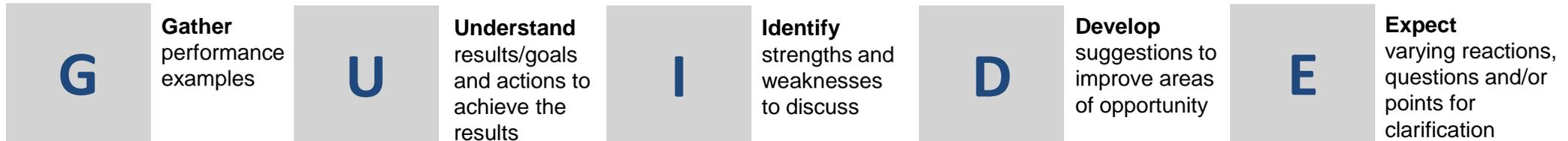
The final phase of the Performance Management cycle, the *Performance Review Discussion*, is a Manager's opportunity to recognize and discuss with a TSM their performance and achievements over the past year. Additionally, it is an opportunity to be future-focused by inspiring the TSM on the capabilities they can further develop and the initiatives and achievements they may be positioned for in the upcoming year.

Preparing for the Discussion

Use the following checklist to prepare for the Year-End Performance Review Discussion.

Activity	Guidance
Discussion Logistics	<ul style="list-style-type: none"><input type="checkbox"/> Schedule the session in advance thinking through the modality of the discussion, time zones, length of discussion, etc.<input type="checkbox"/> Send in advance a note to the TSM explaining how and when the discussion will be delivered
Reflect on your TSMs Self-Assessment and Individual Goal (MBO) Comments (if applicable)	<ul style="list-style-type: none"><input type="checkbox"/> Review your TSMs self-assessment and Individual Goal (MBO) comments to proactively identify and plan for any misalignment on perceived performance (surprises)
Prepare your Feedback	<ul style="list-style-type: none"><input type="checkbox"/> Identify the TSMs strengths and areas of opportunity<input type="checkbox"/> Gather concrete examples of the TSMs performance that demonstrates the reason behind their performance ratings
Mentally Prepare	<ul style="list-style-type: none"><input type="checkbox"/> Take a moment before the discussion to position yourself with the right frame of mind understanding the importance and impact of this discussion on your TSM<input type="checkbox"/> Limit distractions in order to provide the attention the conversation deserves

Take time to rehearse the conversation leveraging the G.U.I.D.E. Framework to ensure that you are confident and prepared for the discussion with your TSM.



Preparing for Different Conversation Types

When preparing for your Performance Review Discussions, it is important to recognize that there are three types of conversations you may engage in.

1 The Inspiring Conversation

The inspiring conversation is one that takes place with your High Performers – those that receive a '**Substantially Exceeds Expectations**' or '**Exceeded Expectations**' rating. This is an opportunity to recognize their achievements and the impact they've had on the organization. Inspire and further engage them with an overview of new and exciting opportunities for them to contribute during the upcoming year that is in alignment with their career aspirations.

2 The Empowerment Conversation

The empowerment conversation is one that takes place with your solid and consistent contributors – those that receive a '**Met Expectations**' rating. This is the conversation that will likely take place most often. During this conversation recognize the TSMs achievements and empower them to continue to succeed and elevate their performance by reinforcing with them that they own their career, and you are here to coach and guide them.

3 The Motivation Conversation

The motivation conversation is one that takes place with your TSMs who require performance improvement – those that receive a '**Below Expectations**' or '**Did Not Meet Expectations**' rating. It is important to recognize during this conversation the TSM may display negative reactions to the conversation. Focus your discussion on providing constructive feedback and share with the TSM how you will partner with them to improve.

Conducting the Discussion

Use the following checklist to conduct the Year-End Performance Review Discussion. Further tips and guidance on how to conduct the discussion will follow on upcoming pages.

Activity	Guidance
Provide the TSM with all Relevant Materials	<ul style="list-style-type: none"><input type="checkbox"/> Share with your TSM their Performance Appraisal and Individual Goal (MBO) form (if applicable) <p>Note: Recognize each TSM has unique preferences when receiving feedback. It is recommended, if you choose to send in advance based on TSM preference, that the discussion takes place within 24 hours</p>
Review the Performance Appraisal and Individual Goal (MBO) form (if applicable)	<ul style="list-style-type: none"><input type="checkbox"/> If delivering virtually, you are encouraged to keep cameras on<input type="checkbox"/> Review with your TSM the different components of the Performance Appraisal and Individual Goal (MBO) form (if applicable) <p>For example, feedback on demonstration of the Performance Factors, evaluation of completion of the Individual Goals (MBO), etc.</p> <ul style="list-style-type: none"><input type="checkbox"/> Provide concrete examples of the TSMs performance that demonstrates the reason behind their performance rating<input type="checkbox"/> Focus on the TSMs behaviors and results rather than personal traits<input type="checkbox"/> Be specific and concise when providing feedback<input type="checkbox"/> Remember, this is a two-way dialogue. Practice active listening and make sure you ask your TSM if they have any questions along the way and to provide their perspective
Discuss your TSMs Strengths and Areas of Opportunity	<ul style="list-style-type: none"><input type="checkbox"/> Ask your TSM what they felt were their greatest strengths throughout the year and provide feedback on your perspective<input type="checkbox"/> Ask your TSM what they feel their areas of opportunity are for future development and provide feedback on your perspective<input type="checkbox"/> Share with your TSM insights that their colleagues provided to you demonstrating their strengths or areas of opportunity
Reflect Back While Being Future Focused	<ul style="list-style-type: none"><input type="checkbox"/> Leverage the discussion on their performance to date to lean into conversation about their future growth potential<input type="checkbox"/> Discuss future business and development opportunities

Leverage Active Listening



Give your complete attention

For Example:
Limit distractions
Leverage eye contact



Ask open-ended questions

For Example:
What do you believe your greatest accomplishment was this year and why?



Ask probing questions for clarity

For Example:
Do you feel that is something you want to continue working on this year?



Paraphrase

For Example:
So, while that was your greatest accomplishment this year its not something you want to continue focusing on.



Be attuned to and reflect feelings while withholding judgement

For Example:
Be mindful of both verbal and nonverbal cues
Showcase empathy



Check back for confirmation

For Example:
Am I correct in that understanding?

Be Mindful of Your Language & Positioning

When conducting your TSMs Year-End Performance Review Discussion, it is important to be mindful of the language & positioning you use to ensure the conversation remains constructive and engaging.

Below you will find examples of suggested 'Do's' and 'Don'ts'.

DO'S

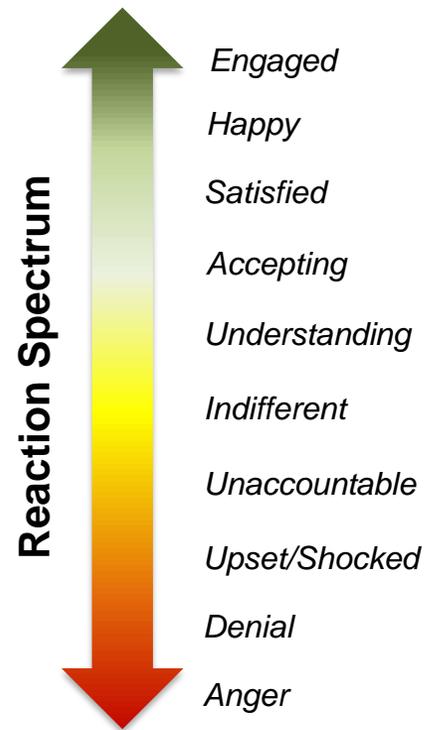
- ✓ Be specific and concise using objective examples when providing feedback
- ✓ Be authentic and courageous in your conversation to provide both positive and constructive insights to the TSM
- ✓ Emphasize words of encouragement to maintain engagement
- ✓ Frame the conversation using positioning such as 'strengths' or 'development areas/areas of opportunity'
- ✓ Ask your TSM for their thoughts and perspectives

DON'TS

- × Focus solely on development areas without recognizing accomplishments
- × Leverage subjective examples when providing feedback
- × Compare TSMs to each other
- × Use words demonstrating an absolute stance (e.g. always, never)
- × Apologize after delivering constructive feedback – you are doing this for the TSM's and organization's benefit
- × Start with a discussion regarding compensation

Managing Challenging Reactions

During the Year-End Performance Review Discussion, the feedback and evaluation provided to the TSM should not come as a surprise due to ongoing coaching conversations throughout the year. Even so, TSMs may fall in different places across the reaction spectrum. Below are examples of some of the more challenging reactions you may encounter and guidance for how to respond.



Reaction	Employee Cues	Guidance for Response
Indifferent	<ul style="list-style-type: none"> Nonverbal cues may include shrugs, reduced eye contact, silence Verbal statements may include “Sure, whatever you say”; “Maybe; I’ll see what I can do” 	<ul style="list-style-type: none"> Reframe the conversation by asking that the TSM self-reflect on their areas of opportunity Reinforce the need for them to commit to action by explaining the “Why”
Unaccountable	<ul style="list-style-type: none"> Nonverbal cues may include shrugging, shaking their head ‘no’ Verbal statements may include “It’s not my fault”; “Yes, that happened but its because...” 	<ul style="list-style-type: none"> Actively listen to the TSMs explanation Empathize with the TSM while providing constructive and clear examples that restate your position/evaluation Reinforce the need to improve despite their reasonings
Upset/ Shocked	<ul style="list-style-type: none"> Nonverbal cues may include shaking their head ‘no’, tears, flushed Verbal cues may include cracking voice and statements like “This isn’t fair”; “This is the first I’m hearing this was ever an issue” 	<ul style="list-style-type: none"> Give the TSM time to digest the feedback you’ve given them Allow the TSM to express their feelings Use open-ended questions to gain greater clarity as to their reaction
Denial	<ul style="list-style-type: none"> Nonverbal cues may include shaking their head ‘no’, rolling their eyes Verbal cues may include “I don’t know what you’re talking about”; “Well, I think I performed just fine” 	<ul style="list-style-type: none"> Gauge the TSMs reasons for resisting the feedback Reframe constructive feedback citing clear and objective examples Be transparent with the TSM about the importance of focusing on the identified development areas
Anger	<ul style="list-style-type: none"> Nonverbal cues may include shaking their head ‘no’, flushed, strong hand gestures Verbal cues may include raised voice or statements like “After everything I’ve done this is what I get” 	<ul style="list-style-type: none"> Allow the TSM to express their feelings while remaining calm and not getting defensive Use open-ended questions to gain greater clarity as to their reaction Suggest possible next steps. You may need to reconvene after the TSM has had time to process the feedback

Wrapping Up the Discussion

Use the following checklist to provide next steps to the Year-End Performance Review Discussion.

Activity	Guidance
Summarize the Key Discussion Points	<ul style="list-style-type: none">❑ Highlight the key topic areas that surfaced from the Performance Review Discussion (e.g. strengths, areas of opportunity, how you will partner moving forward)
Conclude the discussion on a positive and future-focused note	<ul style="list-style-type: none">❑ The Performance Review Discussion is a great opportunity to engage your TSM with what lies ahead. End on a positive note sharing with the TSM how you are committed to supporting them in their continued development
Thank the TSM	<ul style="list-style-type: none">❑ Remember, engaging in Performance Review Discussions can be personal and challenging for TSMs. It is important to thank them for their contributions and engaging in the dialogue
Discuss Next Steps	<ul style="list-style-type: none">❑ Discuss with the TSM how you will continue to coach them to enhance their strengths and/or areas of opportunity❑ Share with the TSM when you will be reconvening to set goals for the new year❑ Ensure the TSM knows that you will continuously have conversations regarding their growth, development and performance throughout the year❑ Explain that following this discussion the TSM will receive a notification to 'Acknowledge' their Performance Appraisal and Individual Goal (MBO) form in Workday (if applicable)

**Please contact your HR Business Partner if you
have any additional questions**