



# Gathering Performance Feedback

In order to ensure an objective performance evaluation, it is important to gather performance feedback from others across the organization who have partnered closely with your TSM throughout the year and have observed their performance.

Below, you will find useful guidance on how to ensure you solicit feedback from individuals with varying perspectives and a template you can distribute throughout the year to request performance feedback and insights.

## Who to Ask

When identifying individuals to provide performance feedback it is important to ensure a diverse group of individuals. There should be representation from all 4 of the relationship categories listed below, as applicable, and you should layer a diversity and inclusion lens to your selection. Ensure that there is a mix of individuals selected that are from similar and different ingroups, are of various levels, and represent different areas of the organization the TSM partners with and/or impacts for example.

The individuals may be:

**Collaborators:** Colleagues and peers who have experience working with the TSM on a regular basis or as part of a special project/assignment.

**Direct Reports:** The individuals that report directly into the TSM being reviewed.

**Customers:** Individuals either internally or externally, who are impacted by the TSM and the achievement of their responsibilities.

**Matrix Manager(s):** An individual who works in close partnership with the TSM to guide, coach and partner with them ensuring successful delivery of responsibilities. Can also be a project lead for an initiative the TSM is a part of.

Additionally, it is imperative that the individuals identified are objective sources that are able to provide insights based on observed behaviors and results. Use the questions below to determine if the individuals you've identified are appropriate. If you have selected 'Yes' to at least one of the questions, the individual should be considered a source of performance feedback.

Question	Yes	No
Does the individual frequently have work-related interactions with the TSM?		
Does the individual report into the TSM?		
Did the individual work with the TSM on a special project or assignment within this calendar year?		

Question	Yes	No
Is the individual impacted by the achievement of the TSM's responsibilities?		
Does this individual coach, guide and/or partner closely with the TSM?		
Is the TSM responsible for delivering results in support of this individual and their area of responsibility?		
Does the individual have visibility into the skills and knowledge the TSM possesses?		

## When to Ask

Research shows that when feedback is received at least once per month from direct managers, it ultimately leads to higher performance. To that end, it is important that managers request feedback from appropriate individuals in a timely manner to ensure the feedback is objective, balanced, detailed, and relevant. This in turn will enable managers to engage in effective and continuous performance discussions throughout the year.

Examples of opportune times to ask for performance feedback and insights may be:

- Following key milestones of a project and/or assignment
- At the conclusion of a project and/or assignment
- During mid-year within the June to August timeframe
- At year-end during the 4<sup>th</sup> quarter
- Following the completion of a development opportunity

Please note when soliciting feedback from external customers and/or vendors/suppliers, the positioning of the feedback will differ from an internal request. The feedback gathered from those external to the organization is recommended to be collected through already generated feedback sources (e.g., voice of the customer surveys).

## How to Ask

Below is an example email template you may distribute to solicit performance feedback using the questionnaire included at the end of this guide.

Subject Line: Feedback Requested on [TSM Name] Performance

Dear [Name of Feedback Provider],

In order to provide effective, objective and constructive performance feedback to [TSM Name], I feel it is important to gather feedback from others who directly observe [TSM Name] performance.

As such, I kindly ask that you complete the performance questionnaire [below/attached] to provide your insights **by [Date]**. Please know I will be aggregating this feedback to maintain confidentiality but please know if a specific assignment/deliverable is mentioned, that may be considered identifiable information.

I thank you in advance for your insights and feedback. If you have any questions, please kindly let me know.

Sincerely,

[NAME]

**Note:** To be copied and pasted in an email for distribution. This information should be aggregated to maintain confidentiality to the best of your ability before providing feedback to

**Performance Feedback Questionnaire (Internal Use Only) – [TSM Name]**

*Directions:* Please kindly complete the questionnaire below to provide insights on [TSM's Name] performance throughout the year. Your feedback is intended to be delivered in aggregate form and is instrumental in ensuring an objective evaluation of performance and the providing of actionable feedback for continued achievement, growth, and development.

**Your Name:**

**Your Title:**

**Rating Scale Questions:**

Place an 'X' in the table below under the response that most closely reflects your perspective.

	<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Neither Agree nor Disagree</b>	<b>Agree</b>	<b>Strongly Agree</b>
This TSM demonstrates the Team Schein Values consistently.					
This TSM makes valuable contributions which impact the achievement of goals and objectives.					
Given the choice, I would partner with this TSM again on projects/ assignments/ deliverables.					
I would recommend others partner with this TSM on appropriate projects/ assignments/ deliverables.					

**Open-ended Questions:**

1. Please describe the professional interaction(s) your feedback is based on (e.g., the project or assignment you worked together on).
2. Based on your observations, what did the TSM do well consistently?
3. Based on your observations, what areas of improvement does the TSM have in relation to their current role and responsibilities?
4. Please provide any other additional comments you may have.