The Review Conversation: A Guide for Managers

The review conversation should serve as a summary discussion of the ongoing communication and feedback that has occurred throughout the performance year. The conversation should be a thorough discussion by both parties of the strengths and contributions made by the employee throughout the review period. It should also include a discussion of the areas in which the employee needs to improve.

Preparing for the conversation:
- Be clear that the scheduled meeting is a performance review conversation.
- Give the employee sufficient notice to prepare for the conversation (at least 3-5 days).
- Set aside sufficient time. Often a comprehensive discussion will require one hour. Setting aside less time may communicate to the employees that they are not important enough to receive a sufficient amount of time.
- Set the expectation of employee involvement by asking for the employee’s reflection on performance and preparation to discuss not only what has been done well, but also the areas in which improvement and/or growth is needed.
- Choose a quiet setting with no interruptions. Once the conversation has started, do not allow phone calls or other disturbances. The full attention of both manager and employee is important.

Engaging with the employee:
The employee should be a fully engaged partner during the review conversation.

To promote involvement:
- Ask questions that require more than a yes or no answer; for example, “What do you think have been your biggest accomplishments during this review period?” “What things would you like to improve?” “What was most challenging?” “What was most rewarding or enjoyable?”
- Ask how the relationship with the employee can be improved. The manager needs to know from the employee what can be done to provide assistance. Keep in mind that helping is not “doing for” someone, but enabling the person to do it for themselves.

Ending the conversation:
Summarize the discussion. Put the conversation into proper perspective. This is particularly true if there have been some major performance challenges. While problems need to be addressed, the employee should not have the impression that every area of performance is deficient (for some it may be, but this should have been addressed long before the formal performance review). In addition, no one should have the impression that everything they do is perfect – some areas of performance can always be strengthened. The manager should attempt to strike a balance.

End on a positive note! Comprehensive performance reviews are hard work for both manager and employee. The closing of the conversation is the final opportunity to reinforce the idea that a
performance review conversation is a constructive experience. Emphasize the importance of the employee to the department and confidence in the employee’s ability to do the job.