

CHECKLIST

DELIVERING A REMOTE PERFORMANCE REVIEW

Step 1: Preparing *(note: this step may take up to 2 weeks)*

- Download a resource to help better prepare for this remote review
- Notify your employee of the upcoming review and ask them to pre-send a year-in-review summary: highlights, challenges, opportunities
- Schedule the review time via a Zoom Conference Call
- Solicit input from 2-3 co-workers to help you consider other perspectives
- Schedule focused time to think through how the employee's performance has been over the course of the year. Review notes, projects, input from others.

Step 2: Writing *(note: this step may take a few days)*

- Keep the end in mind: Before putting pen to paper, focus on the goal of having your employee feel valued and recognized for their contribution to the team.
- Review all input: employee, co-worker, yours and look for themes or patterns worth highlighting. Make a note of incidences of great performance or needed shifts.
- Pull up the employee's prior year review (if possible) and refresh your memory on the conversation and outcomes.
- Do your best to craft a balanced summary of everything you've collected.

Step 3: Delivering

- Insure you are in a quiet place without distractions. Silence your phone.
- Get on the call a minute or two early and make sure your video and audio are working and that you are prepared with your notes.
- Acknowledge the shift in setting and share that despite being remote, you'll do your best to deliver their review as you normally would in person.
- Eye contact, tone of voice and body language will mean twice as much as before. insure you are watching and listening with both eyes and ears.
- If any part of the review is tough to hear, make sure you interject questions that allow them to share their perspective.

<i>What are your thoughts on that feedback?</i>	<i>How can I help you make this shift?</i>
<i>How do you feel like this can impact your growth?</i>	<i>What support do you need from me?</i>
<i>What do you think your biggest challenge here is?</i>	<i>What's your perspective on this?</i>
- Sometimes employees need a minute to process what they are hearing. Allow space for silence - this may feel more awkward over video, be patient.
- Wrap up with enthusiasm and support for their growth and potential on the team. If shifts in their behavior or performance are required moving forward, make a plan to follow up on a specific date to talk more about it.

BONUS WORKSHEET

PREPARING FOR A TOUGH CONVERSATION

Begin with these Main Points in Mind:

- *Have Good Intentions*
- *Prepare*
- *Acknowledge Emotions*
- *Don't Feed Into Drama*
- *Be Courageous*
- *Participate*
- *Use Intuition*
- *Accept Responsibility*
- *Get Buy In*
- *Really Listen*
- *Keep Your Eye on the Goal*

Key Steps to Prepare:

1. **What is the issue?** Identify the exact issue at hand. Ask: Right now, the issue I most need to resolve is....
2. **What exactly is going on?** Get really clear on what the problem is and what the backstory or unseen conditions are.
3. **What impact is it having?** Describe the impact the problem is having on you and the team. What is happening as a result of what's going on?
4. **What are the implications?** If this issue continues, what are the effects and implications?
5. **What is at stake?** What is at risk by the issue not being resolved? A critical project, a client relationship, a department reputation?
6. **What is my role in the issue?** Take stock of what your role might have been in this situation developing.
7. **What are the possible outcomes?** Come up with some potential solutions. Remember there is more than one way to have a win.
8. **What does the best resolution look like?** With agreement from all parties, what is most amenable solution at hand?

Other Questions to Consider

- What is really going on?
- Do I know the whole story or only part of it?
- Is this the right time to address it?
- Is this an on-going issue or a one-time incident?
- What assumptions am I making about the person's intentions?
- Am I more emotional than this situation warrants?
- Is the person aware of the problem or will this catch them off guard?