

Guide to Performance Reviews

The performance review form is used to evaluate your employee's performance and identify development opportunities for the future. In this guide, learn how to complete the Manager Assessment for your employee.

It's Easy

Select Performance from the drop-down navigation menu and click the Team Overview tab. After employees complete their Self-Assessment, their performance review forms are sent to you for review and evaluation. Click **Review** in the Manager Assessment column to open the employee's form. Any ratings or comments you enter in the performance review form will not be seen by the employee while the form is in progress and not yet finalized.

1 Manager Review

Review the employee's self-assessment, including ratings and comments on performance prior to conducting your own evaluation of the employee's performance.

2 Add a Rating

For each objective, core value, and job specific competency, click the ★ Stars to enter performance ratings that best represent the employee's proficiency.

3 Add Your Comments

In the Comment fields, enter your evaluation feedback to support your ratings. Consider the employee's overall, year-long performance in this area, and provide clear and specific examples of achievements.

4 Writing Assistant and Coaching Advisor

Click the **Writing Assistant** for help writing feedback on the employee's performance on core values and job specific competencies and identifying resources to help with development.

The Writing Assistant helps you quickly describe how the employee is performing on individual core values and job specific competencies by providing suggested content, which you can edit, based on the employee's performance level. Use the Coaching Advisor within the tool to recommend books for the employee to read, groups to join, or other actions to take to help develop particular skills identified during the performance review.

The screenshot shows the '2013 Annual Review for Andrea Toucas' form. At the top, there's a navigation bar with 'Performance' and 'Team Overview' tabs. The form header includes a summary bar with a profile picture, overall score (3.69), incomplete items (0), team rank (#1), and supporting information (1). Below this is the 'Introduction' section with a welcome message. The 'Objectives (33.4%)' section contains a goal titled 'Implement an online customer survey by end of Q2 to measure customer satisfaction with online services and transactions'. It shows Benjamin's rating (4 stars, 'Exceeds Expectations') and Andrea's self-rating (4 stars, 'Exceeds Expectations'). The 'Core Values (33.3%)' section includes 'Entrepreneurial Thinking' and 'Adapting to Change', both with Benjamin's and Andrea's ratings and comments. The 'Writing Assistant' button is visible next to Benjamin's comment field.

A summary bar at the bottom of the form, labeled 'Performance Pods'. It contains five numbered pods: 1. Overall Score (3.69), 2. Incomplete Items (0), 3. Team Rank (#1 Out of 3), 4. Supporting Information (1), and 5. Gap Analysis (3 up, 1 down).

Spotlight: Performance Pods

Use the pods at the top of the form as input when completing the employee's review. Click **Save** on the form toolbar to update the information in the pods.

- 1 Overall Score:** Calculates the employee's overall score based on your ratings.
- 2 Incomplete Items:** Number of required items on the form yet to be completed.
- 3 Team Rank:** Employee's rank against peers in your team hierarchy in terms of overall performance score.
- 4 Supporting Information:** Click pod to view feedback provided by peers and/or notes related to the employee's performance.
- 5 Gap Analysis:** Identifies gaps in the employee's performance ratings. Click this pod to view which items you rated higher or lower than your employee.