

Eight Ways to Start a Performance Evaluation



Many managers find it difficult to begin performance evaluations in a way that puts the employee at ease and opens the door to dialogue.

Do you make small talk or start reading from whatever form you're using?

Do you preface the actual evaluation by setting the mood giving visual or tonal clues that it's going to be a good evaluation or a bad evaluation?

Here are eight ways to start a performance evaluation and get things started on the right foot:

1. **Review the agenda for the performance evaluation.** This is especially important if you're new to the organization and the employees are not sure what to expect. Tell the employee what information you'll review and encourage them to ask questions so it's an interactive evaluation, not just you telling them your thoughts.
2. **Review the job description** to see what changes, if any, need to be made based on duties added or removed during the year.
3. **Review last year's evaluation.** Amazingly, many managers don't look back at last year's evaluation. How can improvement or goals be assessed if you're not making a measurement between last year and this year?
4. **Discuss big events at the group that impacted the staff.**

Providers coming or going. Installing EMR. The installation of other software. A move. Merging with other groups. Discuss it.

5. **Discuss the employee's significant events in the past year.** A baby? A marriage? A divorce? A move? A Family Medical Leave Act (FMLA) leave? A new position? Discuss it.
6. **Review the self-evaluation** if you've asked the employee to complete one, and I hope you have. Read the employee's answers aloud and ask questions about what they meant. **Here's my favorite simple self-evaluation.**
7. **If the evaluation is related to a raise or bonus, start by telling them if you're giving them a raise or a bonus.** This is an unusual way to start an evaluation, but I've used it in the past if the employee is unable to relax and really participate in the evaluation because they're so worried about the raise. By the way, it's usually the really good employees who are worried – the so-so employees tend to expect the raise and don't worry about it. Do not start an evaluation by telling an employee you are NOT giving them a raise or a bonus.
8. **Review continuing education** that the employee completed and ask what they learned and how they implemented what they learned.

All of these suggestions give the manager the opportunity to start the evaluation on a relaxed note and engage the employee in meaningful discussion.

Note: I am excited to announce a new book from Manage My Practice coming in July 2011: "The Smart Manager's Guide to Mastering Performance Evaluations." Stay tuned for more details.

Image provided by Wikipedia.