

Conducting Virtual Performance Reviews

Write the performance review

The process for writing a performance review that will be delivered virtually is the same as if you were delivering the review in-person.

- Request employee to complete their Performance Self-Summary
- Gather client feedback (as appropriate)
- Write your performance feedback, incorporating employee self-summary and client feedback and upload into the online performance review system

Schedule the performance review meeting

Schedule ample time for the performance review conversation on both yours and the employee's calendar, so that you both can prepare, plan for a private setting, and eliminate distractions as best as possible. In these challenging times though, be forgiving to yourself and the employee if family/pet distractions do occur. Let the employee know you would like to use video ahead of the meeting.

Conduct the virtual performance review

Send the employee the PDF or Word file of the written performance review at the start of the meeting. Open and close the meeting thanking the employee for their contributions over the past year. Consider the following tips to create a comfortable tone as you conduct your virtual performance reviews with your direct reports.

- Use a camera: Use technology such as Zoom or WebEx with both yours and employee's video on so that you can see each other. This will help create engagement in the conversation and recreate a little bit of the in-person feel.
- Pay attention to your body language and "non-verbal" behaviors.
 - Demonstrate "open" body language
 - Smile and show "welcoming" facial expressions
 - Eye contact (hint: this means looking at the camera – not their Zoom/WebEx picture)
 - Demonstrate attending behaviors such as nodding your head
- Engage the employee to create a 2-way dialogue
 - Ask open-ended questions
 - Actively listen
- Consider the feedback guidelines:
 - Focus on behavior
 - Give specific examples
 - Communicate clearly and check in with the employee to ensure their interpretation of your feedback is accurate
- Encourage the employee to provide you feedback