Reflektive

HR Guide to Designing a Reviews and Check-Ins Program

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1.0 Introduction

Most people believe that the objective of performance reviews is to guide promotion and salary decisions. However, companies are now recognizing that reviews can serve many different functions, including fostering employee growth and development. These **employee-centric review cycles** can help set up workers for success by incorporating past feedback as well as forward-looking goals and projects.

What's more, review programs do have a direct impact on employee engagement. Specifically, those who like their processes for reviews are:

- **3X more likely** to recommend their company as a great place to work
- **2.9X more motivated** to work harder than they have at past companies
- **2.4X more likely** to work at their company two years from now

Given the importance of creating a great review experience, we've included best practices to successfully build and launch a program that your employees will love. In this guide, we'll cover the value of employee-centric reviews and check-ins, and how you can effectively launch and drive a successful program across your company.

2.0

Designing Your Review Program

Every organization approaches reviews and check-ins slightly differently. Some companies use a traditional approach, and have an annual review cycle to gauge performance and guide decisions on promotions and pay raises. Others have more informal, development-focused conversations on a quarterly basis. We recommend a **hybrid approach** to address organizational needs, and boost employee development and alignment. But first, let's cover the differences between reviews and check-ins.

2.1 Reviews vs. Check-Ins: Definitions

	Reviews	Check-Ins
PURPOSE	Support an organization's talent management decisions	Identify strengths and developmental opportunities, and drive manager-employee alignment
FOCUS	Past Performance	Future Growth
CONVERSATION TOPICS	• Key competencies and how the employee performed against each one • Goals completed vs. not completed, and what contributed to those outcomes • Additional skills that would benefit the employee	• Goal updates and adjustments • Knowledge, experiences, and/or collaboration opportunities that would benefit the employee • The most important thing that the employee could have done at least 10% better, and what they would do differently in the future
OUTPUTS	Performance ratings Title changes Compensation changes	Higher engagement Clear development plan Manager-employee alignment

Given the differences between reviews and check-ins, the next question that HR teams ask us is: when should I run review cycles, and when should I run check-ins? We've seen that leading companies conduct performance reviews annually or semi-annually, and schedule check-ins between performance reviews.
A sample calendar is below:

2.2 Select the Right Cycle During Times of Change

While the aforementioned calendar is helpful when it's "business as usual", we encourage businesses to make adjustments when there are meaningful changes to their workforce. To ensure that your HR team is crafting the right cycle for your company now, first decide on the objective of your review or check-in. To think through what is most important to your organization, consider the following questions:

- What are my strategic HR priorities? (e.g., identifying and retaining top talent, improving alignment)
- What is our appetite for change at this time?
- What is the current state of our feedback culture?
- How should review data be used? (e.g., influencing promotions or raises, driving career development)
- How should goals be used to evaluate performance?

Based on how your HR team has responded to these questions, identify which of the five objectives makes sense for your company:

Building a culture of feedback
Boost productivity and engagement with a holistic conversation that spans skills, goals, and career growth

Improving alignment
Ensure that all employees are working towards top-line business goals with frequent conversations on priorities

Developing careers
Motivate and retain talent with a conversation on skills and leadership opportunities

Improving performance
Empower employees by developing their competencies and helping them better align with company values

Informing talent management decisions
Plan for pay raises and promotions by collecting formal qualitative and quantitative data on employee performance

REFLEKTIVE TIP

If you decide to make any changes to your reviews, keep in mind **employee expectations.** Workers look to performance reviews for promotions, pay raises, and goal-setting. If these programs will be paused or altered with your new review cycle, inform employees at the get-go to better set expectations. Many Reflektive customers schedule **education sessions** to train managers and employees on upcoming changes.

2.3 Include the Optimal Questions for your Review or Check-In

Once you've identified the right review or check-in for your workforce, you can start the next phase of question development. In general, it's best to keep your form short and limit it to 4-7 questions. We recommend the following self-assessment questions based on your review or check-in type:

Building a culture of feedback

APPRECIATION

What are 3-5 accomplishments you're proud of?

ALIGNMENT & EVALUATION

Think about your main goals. How have you performed relative to these goals in the past quarter?

Think about the main responsibilities of your role. How have you performed relative to these responsibilities in the past quarter?

COACHING

What is the most important thing you could have done at least 10% better last quarter? What would you do differently next time?

CAREER

What do you want your next career step to be?
What actions can you take to get there?

Improving alignment

Have your goals changed or should they change?

What went well this quarter?

What could have gone better in the last quarter? List 1-2 learnings that can be applied going forward.

What help do you need to make better progress toward your goals?

MANAGER

Provide 1-2 pieces of feedback that could help this employee make better progress toward their goals.

Developing careers

How did you grow your career here last quarter?

What knowledge, experiences, and/or collaboration opportunities would benefit you in the next quarter?

What do you want your next career step to be?

What actions can you take to get there? What support do you need?

Improving performance

MANAGER

Evaluate each value and/or competency and how frequently the employee shows the value

Informing talent management decisions

What goals did you accomplish?

What goals were you unable to achieve?

How will you tackle them differently in the future?

What skills would you like to use more of in your role?

In an ideal world, what would your next role look like?

Additionally, if employees are providing peer feedback, we recommend using the **"traffic light model"** of "start", "stop", and "continue" questions. Sample questions include:

Start	Stop	Continue
What could this person start doing that would benefit their career and the company?	What could this person stop doing to benefit their career and the company?	What does this person do well?

2.4 Develop Success Criteria

After aligning on the objective and content for your review or check-in, we recommend that HR teams ask themselves: “How will we define success?” Below are some of the key metrics that we recommend HR teams evaluate.

Completion rate

See what percentage of employees completed their reviews or check-ins on-time. For 360 reviews, assess peer completion rates too.

Employee Sentiment

Send a poll shortly after the review or check-in to identify what worked and what didn’t, and whether the information was helpful to employees.

REFLEKTIVE TIP

For all survey questions, ensure that there is a comment box for employees to provide more information.

Learn more about Reflektive’s engagement surveys →

CORTLAND CASE STUDY

Reviews and check-ins with Reflektive helped Cortland associates feel more empowered in their career growth. In fact, 60% of employees on performance improvement plans successfully graduated from them.

Read the case study →

3.0

Launching Your Review or Check-In Cycle

Launching a review or check-in requires the coordination of many different moving parts. The following launch plan helps you create a streamlined process for your key stakeholders.

Step 1. Get executive buy-in

Ensure the entire leadership team is aligned on your objective and framework.

Step 2. Share your plan with managers

Schedule a manager training session to review the timeline and process prior to communicating with the broader organization. Ensure that managers are equipped to answer their team's questions.

If you are unable to hold a manager training session, provide managers with information on a wiki or intranet site. We recommend holding office hours so managers can stop by with questions or get assistance on preparing for their conversations.

Step 3. Send a company-wide communication

In your launch email, include information on the "why", "what", and "when" of your cycle (recommended messaging and content is in the Appendix!) Encourage everyone to block time in their calendars for completing reviews so they can finish them before the deadline (HR teams can also send calendar holds for all employees!) Finally, we recommend office hours for individual contributors so they can ask questions on the upcoming cycle.

Step 4. Launch your review, and use nudges if needed

Nudges remind employees to complete their reviews or check-ins. In fact, most Reflektive customers use three nudges per cycle. Additionally, you can get higher completion rates by partnering with managers. For example, managers can share with their team that they've completed their review, and lead by example. More communication best practices are available here.

Step 5. Track progress!

Make sure you are leveraging a people analytics platform, such as Reflektive's People Intelligence solution, to keep track of your KPIs.

Learn more about People Intelligence

Step 6. Ensure fairness by calibrating

Gather team leaders for calibration sessions. Adjust performance ratings to account for leaders who may be easy or hard graders.

REFLEKTIVE TIP

Reflektive customers can learn more about review configurations, how to manage active cycles, and go-live best practices.

View the support article →

Step 7. Gather employee sentiment on the review or check-in

Poll employees, or create a focus group, to gather feedback on the cycle. Ensure that this feedback is documented and available for your HR team.

Step 8. Hold a retrospective meeting

Schedule time with your HR group to review what went well, and what did not go well. Use this information to iterate for future cycles.

LAUNCH BEST PRACTICES FROM HOGANTAYLOR

HoganTaylor achieved a nearly 100% completion rate for their 360 reviews. Learn more about their review program and successful launch plan.

View the blog post →

4.0 Conclusion

Performance reviews don't need to be stagnant. In fact, modifying your cycles based on your business objective and employee feedback ensures that reviews will be valuable and relevant for all stakeholders.

The right program makes a difference in employee performance, and can help drive productivity and engagement over the long term. With an employee-centric review process, leaders and managers can build high-performing, successful teams.

5.0

Appendix

Helpful Performance Review Information for Employees

In email copy, wiki pages, and other employee-facing content, include the below information so that workers will have more context on their upcoming review or check-in.

Why

Why is your company running this review/check-in?

What

What are the benefits of the review/check-in for the employee and the company?
What is the process for the review/check-in?
What tool are we using for the review/check-in?

When

When are the following due dates?

- Self-assessment
- Manager assessment
- Peer assessment
- Direct report assessment
- Meeting between manager and employee

Additional Resources

HR Admins

Performance Reviews in 2020: Best Practices During Times of Uncertainty
Read the Blog Post

Review Question Guidance and Bank
Download the Worksheet

Employees and Managers

Preparing for a Review
View the Article

4 Foundations of a Great Performance Review Strategy
Read the Blog Post