

Writing performance reviews: Details will save the day



When it comes time to writing performance evaluations, it's best to stay away from broad generalizations about the employee's work. Generic observations that lack detail will frustrate employees and reduce the chance that employees will make the necessary changes.

Instead, provide concrete examples that support your stated performance rankings. Citing examples helps drive home your points, motivate employees and, as you'll see later, even defend against legal complaints. Keeping a performance log throughout the year can help you compile these specific examples (see *box below*).

Use the following guidelines to help write evaluations:

1. Cite specific examples of employee performance—both positive and negative.

Wrong: *"Alex doesn't get his work in on time."*

Right: *"Over the last year, Alex has submitted six of eight customer reports that were two to three days late."*

Wrong: *"Alex's reports are thorough."*

Right: *"Alex's reports detail why customers have left and provide concrete ideas on how to regain them."*

2. Tie the examples to ratings and performance expectations.

Example: *"Alex must submit projects on time as part of meeting performance expectations in this area. Alex can help improve his deadline performance by managing his time better and asking questions as soon as they occur."*

3. Include key numerical measurements of performance when possible.

Examples: *"Joe's time to train new hires averages about six hours, instead of the usual seven."* *"Mary didn't meet her sales goals during eight of the last 12 months."*

4. Suggest ways to coach employees to improve performance.

"We will have Jim spend a day listening to customer service representatives who adhere to company practices. The goal is to help Jim meet the company's expectations for the position."

The legal reason to get specific

Here's another reason to fill your performance reviews with specifics: Courts will believe a manager's notes a lot more than his or her recollections.

Say an ex-employee sues, claiming his firing was a case of age or sex discrimination, not poor work. If a manager can show notes and performance reviews that detail the poor performance, the organization will be much more likely to win the case.

Case in point: A Georgia factory worker sued after being fired for poor performance. The employee, who is black, argued that the real reason was race discrimination.

His proof? A white manager with the same title also received a poor evaluation but kept his job.

The company argued that the two managers weren't comparable because the fired employee had a much longer list of mistakes, and the company had clear documentation to prove it. The court agreed and tossed out the case. (*Frazier v. Doosan Infracore*)

Bottom line: Courts don't want to micromanage a manager's every move, but they do expect you to document your decisions.

Keep a performance log for every employee

It happens to every manager: You sit down to prepare a staff member's review and realize you can remember only what the person has done the past few weeks. Or you allow only a single incident (good or bad) to color your assessment.

That's why it's best to institute a system to document performance throughout the year. The easiest way: Keep a performance log for each employee. These can be as simple as sheets of paper in a folder or a Word document on your computer. Establish a system that you will use regularly. Also, keep the notes confidential. Here are some tips:

- **Include both positive and negative behaviors.** The easiest way to do this: Update logs on a regular basis, instead of waiting for a specific incident.
- **Date each entry.** Details such as time, date and day of the week help identify patterns.
- **Write observations.** Don't make assumptions about the reasons for the behavior.
- **Keep out biased language,** including references to an employee's age, sex, race, disability, marital status, religion or sexual orientation.
- **Don't suggest reasons for employee actions** without direct evidence.
- **Be brief, but complete.** Log entries should use specific examples rather than general comments.

What to include ...

- ✓ Project assignments and deadlines met or not met
- ✓ Your assessment of the quality of an employee's work
- ✓ Instances of tardiness, work absences or extended breaks
- ✓ Disciplinary discussions, actions taken
- ✓ Positive contributions to work

... And what to leave out

- ✗ Rumors or speculation about the employee's personal life

- × Theories about the employee's behavior or work quality
- × Information about the employee's family, ethnicity, beliefs or medical history
- × Unsubstantiated complaints against the employee