

How to conduct an effective mid-year performance review

As summer approaches, it's time to start scheduling and preparing for mid-year performance reviews. Regular performance reviews are an integral part of a strong overall performance management system. While many employers think of performance reviews as solely an end-of-year activity, it's a good idea to schedule a mid-year review to discuss each team member's job performance and check in on their progress toward their goals for the year.

Having a mid-year check-in can help you and your staff identify any issues and turn things around for the remainder of the year. Ideally, holding mid-year reviews will lead to more positive year-end reviews and more transparency around employee performance. Here is what you need to know about conducting mid-year performance reviews.

Mid-year vs. end-of-year reviews

A mid-year performance review is a lot like an annual performance review and they are conducted in a similar fashion. Both reviews are typically scheduled one-on-one meetings between a manager and their direct report. Though sometimes additional parties are involved in the end-of-year review if changes in compensation require higher-level approval or if you use a 360-degree review method with peer feedback.

The key difference is that the majority of the annual goal-setting and annual raise discussions will be occurring during the main year-end performance review. This means that the mid-year reviews are typically treated more like progress check-ins than full performance evaluations. Most employers will review annual goals and make adjustments or small additions as needed during mid-year reviews, but employees typically don't receive a full set of new goals during these meetings.

Some employers still use a formal performance review template to document mid-year reviews while others treat them as more informal performance conversations. Consider the goals of your review and the culture of your company to determine what the best approach is for your team. If you offer quarterly bonuses or mid-year raises, taking a more formal approach to mid-year reviews is fine. However, if you can't offer any extra compensation based on good performance it's probably best to treat the mid-year review as a progress report rather than a final report card.

How to prepare for mid-year reviews

Go into mid-year reviews with a clear idea of what you hope to achieve with them. It can help to start compiling and reviewing any relevant documents such as records of prior performance reviews, the list of annual goals set for the year, the employee's job description, and any learning and development records. It is a good idea to review these documents and jot down some review questions that you want to ask during the meeting. While most employers have a standard set of review questions, it is helpful to also include some personalized questions based on the employee's past performance and job duties. For example, if they recently were given new job responsibilities or there was an area that they needed to improve in after their last performance

appraisal the mid-year review is a good time to check in on these things.

Since employees are sometimes hesitant to bring up concerns due to the anxiety that comes with performance reviews, it can help to have employees complete a self-assessment before the review. This gives managers some advanced insight into areas that employees may need help in or concerns that they can follow up on during the actual review meeting to gather more information. You'll often get better feedback in a short survey or assessment than you would by putting them on the spot during the meeting.

How to conduct mid-year performance reviews

Here are the key components of the mid-year performance review process. It's also important to remember that it is a two-way conversation, so leave plenty of time on the agenda for employees to ask their own questions or bring up issues that they are experiencing. Each review may go slightly differently depending on what the employee wants to discuss.



annual goals

Most employers work with employees to set goals for each year (or quarter). If you're not already doing this as a part of your performance management practices, it's a good idea to start. During the mid-year review, one of the focal points of the discussion should be how the employee is doing in meeting their objectives for the year.

If they are not hitting their monthly targets or making adequate progress towards bigger goals, explore the reasons for this. Allow the employee to share their perspective on the issue and work together to come up with a plan to improve.

Make adjustments to their goals

One great thing about conducting a mid-year review is that it gives both the manager and the employee an opportunity to adjust the annual performance goals if priorities have changed or the employee is having difficulty hitting their targets.

Sometimes as you discuss the employee's progress, you may find that there isn't a way to help them achieve their goal. Perhaps the goal that was initially set was too ambitious. Other changes may occur that could also prevent them from achieving their set goals. If their department experienced budget cuts or staffing changes, goals may need to be adjusted to account for decreases in spending or changes in how the employee is able to allocate their time.

Be open to making adjustments so that employees feel that they have reasonable goals. Setting some stretch goals is fine, but overall you should be setting metrics that employees can reasonably achieve without putting in extra hours or neglecting their other work tasks.

Ask what they need from you

While performance review meetings are typically focused on the employees' performance, it's also a great time to check in on your own performance as a manager. Discuss how you could better support their success during the remainder of the year. You can ask them what you or the organization can do to help them achieve their goals.

It can also be helpful to ask if there are any specific tools or resources that they feel would improve their

Check in on their progress toward

productivity and work performance. This is particularly important for small businesses or start-ups that may not yet have all of the popular software tools available for their employees. An employee may find that they are spending a lot of time on a particular task that could be simplified or automated with a specific tool such as a CRM, applicant tracking system, or social media management solution.

Often as a manager you may not initially realize when your team has outgrown the current way of doing things, so it's vital that you give them an opportunity to ask for what they need. Often these discussions will come up during the year-end reviews when goals are created. However, smaller businesses can experience significant growth or change in a 6 month period, necessitating more frequent discussions. Employees may also not realize what tools or managerial support they truly need until they actually dive into new projects or goals, so you may get clearer answers during the mid-year review.

Check in on employee satisfaction

In addition to performance management, mid-year reviews are also a great tool for improving employee engagement and retention. In addition to checking in on the employees' personal performance, you should also check in about how they are feeling about their work. It's also good to check in on professional development and advancement goals so that employees know what growth opportunities they can work towards internally rather than looking elsewhere for new opportunities.

Some questions that you can use to gauge employee satisfaction and retention include:

- What do you like most about your job?
- What do you like least about your job?
- How do you feel about your current workload?
- What's one thing you would change, if possible, to make your day-to-day work run smoother?
- What are your professional growth and advancement goals?

You can also inquire about any changes that have been made recently. Since annual performance reviews are often done at the end of the year or very beginning of the year, any new policies or organizational changes for the year may not have gone into effect until after the annual performance review. The mid-year review is a good time to check in on morale and how employees may be feeling about any changes that you made within the company.

Follow up after the review

You shouldn't wait until the end of the year review to follow up on the topics discussed during the mid-year review. Be sure to follow up on any action items from the review meeting promptly. Followups may include providing them with requested tools or professional development resources. It may also include acting on the feedback received by communicating more actively or incorporating their feedback into your management approach. It's important to show employees that you are listening to them and acting on their feedback.

Why you need to conduct mid-year reviews

Having regular conversations throughout the year regarding employee performance can help improve employee

engagement and work quality. A mid-year performance review is a great way to keep track of employees' progress towards their yearly performance metrics and to catch any issues as they arise.

In light of the current labor market, a mid-year review is also an important retention strategy. Mid-year reviews are an opportunity for employees to ask for help, provide you with constructive feedback, address concerns, and discuss their professional growth. As an employer, that gives you an opportunity to promptly address issues that may be leading to disengagement or frustration before they turn into big enough issues to cause the employee to look for a new job. Don't skip out on your mid-year reviews. They're good for the company and the staff.