ClearCo.

A Mid-Year Performance Management Checklist for HR

Are you conducting mid-year employee performance reviews? 92% of employees say they want feedback more than just once a year, and semiannual reviews are an excellent opportunity to see how your people are doing and boost employee performance.

Whether or not semiannual evaluations are on the schedule this month, halfway through the year is also a good time to take stock of your performance evaluation processes. That's why we've created the Mid-Year Performance Management Checklist for HR.

Use this Checklist to carry out a mid-year audit of your internal performance management process and prepare for giving semiannual reviews.

Fast Facts About Performance Reviews

- Only 13% of employees and managers and 6% of CEOs believe their company's performance review system is effective.

- Employees whose companies use continuous feedback systems are 65% more motivated and 66% more productive.

- 80% of employees who received feedback in the past week are fully engaged at work.

Performance Management Process Check-In

1. Review and Reflect on Goals

Setting objectives is useful just for individual employees or for the organization but for most strategic initiatives, performance management included. Giving performance reviews without understanding why they're given isn't helpful for anyone, no matter which side of the review they're on.

☐ **The HR team understands the goals of my company's performance management process.**
Consider what insights your HR team hopes to gain from mid-year performance reviews, annual reviews, and employee performance data as a whole. Be sure to set goals for how you'll leverage those insights, like identifying high performers and enabling skills development.

☐ **Managers understand the goals of the performance management process.**
As the individuals giving these reviews, people managers need to understand the goals of the reviews, whether mid-year or annual. That helps inform their feedback and increases the effectiveness of reviews.

☐ **Employees understand the goals of performance reviews.**
Today, employee evaluations aren't just about scoring performance. They're a chance to identify their strengths, talk about areas for growth, and provide motivation and connection. Let employees know the purpose of annual and semiannual reviews so they can get the most out of their evaluations, too.

2. Prevent Bias and Ensure Fairness

Fair, unbiased performance reviews are essential in order to be effective. 85% of employees say they'd consider quitting if they felt their review was unfair.

☐ **Employees are evaluated on standardized criteria that are communicated to managers and employees.**
Setting performance standards ensures that employees understand what they need to do to succeed and gives managers a blueprint for how to measure progress. Clear criteria help keep personal bias out of performance evaluations.

☐ **Employees receive training on how to recognize and overcome biases that can impact feedback and performance ratings.**
Educating your employees, especially those who give performance reviews, on unconscious bias is essential for fair, accurate evaluations. Understanding different types of bias means you can put systems in place to overcome them, and it shows employees that your organization is committed to equity in the workplace.

☐ **HR has established a procedure for employees to report concerns about the fairness of their reviews.**
Be sure that employees understand how the procedure works and that any concerns reported are investigated thoroughly. Consider working with a consulting firm for an unbiased review of your processes and to develop procedures for ensuring fairness and reporting concerns.

3. Consider Feedback Methods and Touchpoints

How often do managers initiate conversations about employee performance? Are ratings based on a variety of criteria and feedback from more than one person? Don't relegate important performance discussions to quick end-of-year chats with a supervisor.

☐ **Employee performance feedback comes from multiple sources.**
Reviews that utilize feedback from employees' peers, managers, and the employees themselves build a more accurate and comprehensive picture of performance. You can gather this feedback with 360 reviews and employee self-assessments, as well as by encouraging regular employee recognition.

☐ **Employees receive performance feedback more than once or twice per year.**
If employees only talk about their performance once or twice a year, they're unlikely to be motivated or engaged. How could they be excited about or interested in work when they don't know if they're smashing goals or falling behind? Continuous feedback keeps employees on track and helps foster an open line of communication between employees and their managers.

☐ **Performance reviews include qualitative and quantitative feedback.**
Using qualitative metrics for performance ratings ensures the fairness of performance reviews — sales representatives either meet their quarterly goal or fall short. Quantitative feedback brings employees' strengths and weaknesses into focus and can provide context to ensure the accuracy of reviews. A sales representative who missed their goal but received glowing praise from nearly every client and stellar feedback from their peers may just need better time management skills to hit that target.

4. Evaluate Your Performance Review Tools

The tools you use to execute performance reviews can be the difference between encouraging employees' professional growth and driving them to disengagement. Is your performance management software effective and easy to use for all employees? This section can help you perform a quick pulse check.

- [ ] **Our performance management system offers pre-built review templates and customizable reviews.**
  Performance review templates enable your team to kick off mid-year reviews fast, while customization options give you the flexibility to tailor questions to your specific needs.

- [ ] **Our software sends automatic notifications and reminders to participants to keep review cycles on track.**
  Automated workflows keep everyone on schedule, HR included. A system that prompts your team to get reviews started and sends reminders to ensure they're completed on time takes hours of administrative tasks off your team's plate.

- [ ] **Performance reviews can be completed on mobile devices as well as desktops.**
  If everyone can access their performance review from the most convenient device, you'll increase response rates and make the process easier for all participants.

- [ ] **Our performance management software includes insightful reports that are easy to generate.**
  Detailed, easy-to-use reports help you understand your performance data and reveal any issues with your process. Ensure employees are being scored fairly, address underperformance, and appreciate and learn from top performers.

Why is mid-year a good time to evaluate performance management software?

Businesses often set budgets in the fourth quarter. A review of your current tech and tools mid-year means you'll have a pulse on the quality of your tech in time to make the case for a new system or maintain a contract with your current vendor.

. . . .

Employee Performance Check-In

Mid-year performance reviews are an excellent way to support a culture of ongoing feedback and recognition. Now that you've evaluated your performance management process overall, you can prepare for upcoming mid-year reviews or get started with the process for the first time.

Use this Checklist to make mid-year reviews as effective as possible for you, your team, and your business.

1. Do the Prep Work

It's essential that managers and employees are prepared for semiannual reviews so the time spent is useful and leads to action.

☐ **Schedule the review and explain the process.**
Even if the employee has been with the company for a long time, it is always important to provide an overview of the review process, especially the scale on which the employee will be evaluated.

☐ **Gather necessary performance data.**
Go into mid-year reviews with a solid understanding of current performance. Reviewers can do this by going over the job description, conducting peer reviews, issuing self-evaluations, and examining notes from one-on-one meetings.

☐ **Formulate feedback and a plan.**
After you gather and analyze the data, you have a clear picture of whether or not the employee is achieving expectations and can prepare your feedback. Does the employee need to be placed on a performance improvement plan? Are they on track for a promotion or in need of learning opportunities? However they're progressing, come prepared with a plan of action for what comes next.

....

2. Conduct a Constructive Conversation

Now that you've prepared your feedback and have a plan in mind, it's time to give the performance review and foster a productive conversation with the review subject.

☐ **Let the employee speak to their performance.**
Ask the employee to assess their progress on achieving the performance plan and how their deliverables meet project objectives. Then, you can add your perspective and share constructive feedback.

☐ **Communicate key priorities and objectives.**
Use the employee's goals as the basis of your discussion, highlighting what they're doing well and where there are opportunities for improvement. Ensure they're getting the support they need to stay on track and make adjustments to their goals if necessary.

☐ **Gauge employee engagement.**
Ask how the employee feels about the work environment and how challenged and satisfied they feel working for your organization. You can gain deeper insight into engagement levels and make necessary adjustments in efforts to retain top talent.

☐ **Provide support and recognition.**
Ask employees how you can best support them employee and commit to doing what you can to ensure their success. Don't forget to offer recognition and praise for their accomplishments through the year so far.

☐ **Open the floor for feedback.**
Ask your direct reports how you're doing as their manager, how they feel about their role and duties, and any other feedback they want to give.

....

3. Follow Up

Mid-year reviews should end with a commitment to continuous improvement from both employees and managers. Ensure managers follow up on any action items from the discussion and foster an ongoing open dialogue with their direct reports.

☐ **Use action items to set new goals.**
Did anything in your discussion spark an idea for a new professional goal? For example, if you highlight an employee's strengths in public speaking, you might work with them to set a goal to host a company webinar or other event.

☐ **Check in with employees at least once a week.**
It's essential to discuss goal progress often to keep employees on track. Meet with them at least once a week for regular check-ins about their progress at work.

☐ **Empower employees to ask for feedback outside of formal reviews.**
One-on-one meetings are a great way to ensure employees have a chance to ask questions and get support on a regular basis. Encourage them to reach out for help whenever it's needed so they have what they need to meet their goals.

Performance management is a continuous process that requires calibration and recalibration. Carve out the time for these important conversations to keep individual and business goals aligned and enable your organization to achieve its mission.

....

Standardize, automate, and analyze employee reviews with ClearCompany Performance Management.

Schedule a demo