

Virtual Performance Review Recommendations

Remote work has many advantages, but it can create some challenges when managing employee performance. This document provides a few tips to help you administer performance management in a virtual environment and ensure that performance reviews and feedback will be effective and useful for your employees.

Communication

Communication in a virtual environment needs to be intentional. Because you are working remotely, you will not have the opportunity to bump into your employee in the hallway or stop by their desk. You will need to build in time not only for discussion about work, but also for casual conversation.

- Plan to build in additional check-in meetings and opportunities for discussion.
- Ask your employee how they prefer to communicate and receive feedback and ensure that you have a clearly communicated plan for discussing work priorities, deadlines, and progress.
- Make sure you allow time for casual conversation. Ask your employee how they are doing and allow time for water cooler conversations.

The Performance Review

As you prepare to administer performance reviews, consider the following recommendations to ensure that you can make the most of virtual performance management.

1. Schedule the time on both calendars and respect it. Be sure you find a time when you will both be available and will not be interrupted. There should be plenty of time to discuss the review and provide an opportunity for discussion and questions.
2. Communicate the format and expectations well in advance. Plan on a specific tool (e.g. Skype, Microsoft Teams), but have a backup available if technology fails.
3. Provide the completed review in advance. This will help your employee prepare for the conversation and formulate any questions they may have.
4. Use screen sharing to display data as needed. You can walk through the performance review document together or share specific examples as part of the discussion.
5. Build in breaks if needed. If there are a lot of questions or items to discuss, consider scheduling a follow-up meeting. Try to structure the discussion to keep it within a reasonable time period, ideally less than 90 minutes.
6. If there are a lot of questions, consider asking the employee to cover the full review and then discuss more detailed questions in a subsequent meeting.

7. End by discussing plans for the coming year and how those plans will be measured throughout the year. Be sure to talk about milestones and goals. Communicate how you plan to measure success.
8. Follow up in writing on your conversation, including a copy of the completed review once all signatures are obtained.
9. Don't forget to ask if your employee needs anything. This could be physical equipment, like a monitor or phone, or other resources to help them do their job more effectively.
10. Ask if they need any scheduling accommodations. Their specific position may restrict some flexibility in scheduling, but be willing to discuss the needs that your employee has and try to work with them to come up with a solution that will work. Your employees are now dealing with other members of their household present in their workspace, which may include small children, significant others, and pets. Try to be flexible when possible. Talk to HR with questions to ensure that any schedule changes will work with that employee's union contract or plan.

Moving Forward

Many of the best practices for ongoing performance management remain the same:

1. Set clear expectations. Your employees should know what their key performance indicators are. Discuss these expectations during regularly scheduled virtual check-in meetings.
2. Track performance in real time. Don't surprise employees with new information in a performance review. Continually provide feedback to your employees during check-in meetings to help them understand their progress and how to adjust performance going forward.
3. Allow for small talk during the review and in check-in meetings. Ask them about their plans or interests outside of work. It can lighten the mood and allow for a more productive and friendly discussion. It also helps to build rapport which can make delivering performance feedback easier.
4. Follow up on goals, plans, and milestones. The performance review should give you an opportunity to plan for the next year and work toward those objectives as you prepare for the coming year.
5. Recognize the new virtual environment going forward. Typical goals and objectives may need to be refined. Think of other ways that your employees might be able to achieve them (i.e. Online courses/trainings, etc.).