

# Check-ins: a new philosophy for performance reviews



# Table of Contents

**I. The end of annual reviews & beginning  
of continuous feedback**

**II. A new philosophy**

**III. Anatomy of check-ins**

# Introduction

## **Definition: performance review**

A formal discussion between employee and manager to discuss the degree to which the employee reached goals set during the previous review cycle (typically one year before). Ratings of accomplishments are given and new plan of action is determined for the upcoming year.

## **Definition: Continuous performance management, check-ins**

Ongoing one-on-one conversations between managers and employees about work progress, goals, performance to date, and plan of action going forward, held at regular intervals throughout the year. Conversations, aka “check-ins,” can be recorded to build a broader view of accomplishments and progress to develop the employee.

Imagine an interrogation room. Two opponents sit across a table from one another, and the air is full of tension. If this were an old-fashioned detective movie, the police officer would grill the suspect until he cracked.

For decades, the annual performance review was a scenario not too different from this imagined scenario. Once a year, manager and employee would sit across from one another in a formal meeting and discuss everything accomplished or missed over the entire year with point values assigned, goals reviewed, and compensation determined.

The real crux of an annual performance review is that, for the employee, it's an indefensible position to be in. The year is over and the manager is likely here with an evaluation done and future determined.

**It's no wonder that 95% of employees are dissatisfied with the annual review process and 90% don't believe they provide accurate information.**

That's why smart companies are changing the annual performance review.

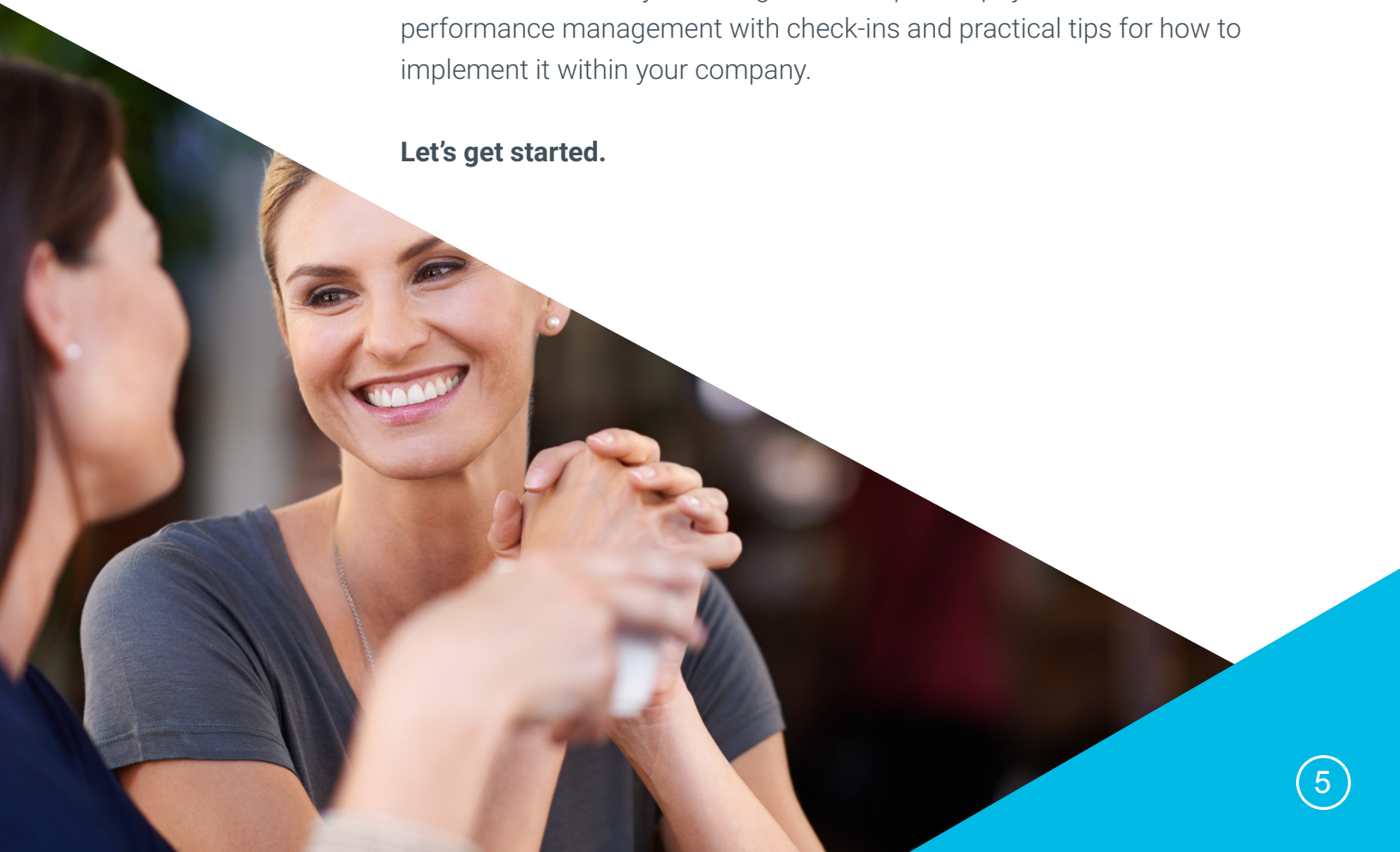
Instead of a single evaluation, companies are switching to a culture of continuous performance management with frequent, recorded check-ins.

When managers provide daily feedback (versus annual feedback), their employees are:

- **6.0 times more likely to strongly agree that they receive meaningful feedback**
- **3.6 times more likely to strongly agree that they are motivated to do outstanding work**
- **3.0 times more likely to be engaged at work**

This ebook will take you through the new philosophy of continuous performance management with check-ins and practical tips for how to implement it within your company.

**Let's get started.**



# The new philosophy of feedback: a fundamental shift

Building a culture of continuous feedback represents a fundamental shift in the philosophy surrounding feedback and the relationship between company and employee. Here's the underlying difference between performance reviews and continuous performance management:

**Philosophy of annual performance reviews:** The company must hold the employee accountable and assess the employee's value.

**Philosophy of continuous performance management:** Employees want to perform well, but they also want to improve, grow, and develop. The company's role is to support the employee on this journey (to mutual benefit).

Companies embracing the new philosophy are building semi-formal "check-ins" into their structure and processes. Check-ins represent a conversation, held at regular intervals, where feedback and notes are collected to record progress and build a plan of action for the future.

## The benefit of doing check-ins:

### Goals

Check-ins on goals tracks progress, identifies obstacles, and ensures open communication on next-steps to be taken.

### Employee Empowerment

Check-ins allow both the employee and manager to be empowered to influence project direction throughout the year and performance expectations. Employees don't have to wait for approval, but instead engage in the process.

### Course Correction

Frequent check-ins progress on projects and overarching goals can identify obstacles and allow for rapid course correction. This will keep employees working towards a productive goal and help managers identify and develop low performers.

### Engagement (feeling of progress)

Check-in conversations builds a stronger relationship between employee and manager. 83 per cent of companies say they see quality of conversations go up with more frequent check-ins. <sup>2</sup>

### Value Investment

Check-ins demonstrate the value your company places in employees. This value is open and transparent to everyone at every level. Feedback and conversations amount to more than a "checked box." You are investing in your employees.

The writing is on the wall. Continuous feedback with recorded check-ins is building a better company culture with better ROI.

## The anatomy of a check-in

Check-in conversations can cover a range of topics, but largely fall into two general categories: performance and development. These conversations also provide an opportunity to collect data more frequently, with a more formal format than an unstructured conversation, but without the rating and pressure of a full performance review.

**Performance check-ins:** conversations are focused on goals and specific projects. While managers want to take the opportunity to acknowledge successes and offer course correction and development opportunity for any missed marks, let employees guide the conversation. Discussion topics may include:

- Status of short-term goals and long-term projects
- Recent accomplishments
- Revising goals with employee

**Development check-ins:** conversations encompass a larger section of time, usually a quarter, with a focus on needs of the employee, skill gaps, development needs, and personal career goals. Discussion topics may include:

- Status of learning and courses in progress
- Training requests tied to professional or personal development goals
- How to achieve employee's career goals

**Timing of check-ins** will depend on the complexity of goals and tasks and the culture you want to cultivate within your company.

## PiiQ check-in scheduling screen

The screenshot displays the PiiQ check-in scheduling interface. On the left, a list of check-ins is shown, categorized into 'Upcoming (3)' and 'Past (6)'. The 'Upcoming' list includes:

- Fortnightly 1:1 for Laura and Anna (Check-in on Mon 19 Feb 2018)
- Interim Performance Review Check-in (Check-in on Mon 19 Feb 2018, Performance Review Q1 2018)
- Get onboard with Marketing - Webex with Lindsey (Check-in on Wed 21 Feb 2018, Onboarding - New Hire Program)

The 'Past' list includes:

- Fortnightly 1:1 for Eileen and Laura (Check-in on Fri 16 Feb 2018, COMPLETED)
- Fortnightly 1:1 for Laura and Anna (Check-in on Thu 15 Feb 2018, COMPLETED)
- New Hire Program - Welcome to the Product team (Check-in on Wed 14 Feb 2018, Onboarding - New Hire Program, COMPLETED)
- Interim Performance Review Check-in (Check-in on Mon 12 Feb 2018, Performance Review Q1 2018, COMPLETED)
- Fortnightly 1:1 for Jim (Check-in on Wed 7 Feb 2018, COMPLETED)
- Fortnightly 1:1 for Lindsey (Check-in on Mon 5 Feb 2018, COMPLETED)

The right panel, titled 'Schedule a Check-In', contains the following fields and options:

- Title \***: Enter a title for this check-in e.g. Monthly 1:1
- Participant \***: Enter a name to add this person to the check-in e.g. a team member who reports to you
- Date of Check-in \***: Set a date
- Notify the participants about this upcoming check-in (optional)**:  Send a notification email
- PREVIEW EMAIL** button
- Topics (optional)**: Add a topic to discuss in this check-in
- CANCEL** and **SAVE** buttons

**Who initiates the check-in:** Check-ins should be empowering and collaborative for both manager and employee. Initiating a check-in conversation should be open to either party; however, a supportive tool like PiiQ can help facilitate the conversation.

## More than just a conversation

A truly productive check-in is more than just a quick chat over coffee in the breakroom. Check-in conversations provide an opportunity to discuss performance and development, and to collect data to be integrated into the employee's overall performance review.

Using a tool can be helpful to keep record of all notes and action items to be used as feedback.

The screenshot displays a digital check-in tool interface for 'ACME CO'. At the top, there's a navigation bar with a home icon, the company name 'ACME CO', and search, settings, and help icons. Below this, a blue header bar indicates the current check-in: 'Fortnightly 1:1 for Anna and Laura'. On the left, a sidebar titled 'Check-in Details' lists various topics like 'Product Roadmap' and 'Employee Goal Setting'. The main area shows a conversation between Anna Garg (Product Co-Ordinator) and Laura Mullen. Anna's message, dated Thu 29 Mar 2018 at 10:05AM, lists her main priorities: finishing a product newsletter, working with the creative team, and reading an SMB segmentation report. She also expresses concern about reduced resources and asks for advice on handling customer and CEO feedback. Laura's response, at 10:35AM, states she will raise the issue with the Dev Team Lead. A third message from Laura at 10:45AM is a private note to herself: 'Escalate dev resource issue with Dev Team Lead'. The interface includes a 'COMPLETE CHECK-IN' button, a 'Type a note...' input field, and a 'SEND' button.

**Self-reflection:** Employees are empowered to use check-ins for self-reflection and to direct conversations with their manager. The employee can direct the conversation based off of the notes captured and discuss what went well, what could be improved, and steps for the future.

**More meaningful performance reviews:** If the company chooses to do an annual performance review in addition to check-ins, the data collected will provide a more accurate and meaningful reflection of the previous year's accomplishments and opportunities for improvement. Check-ins ensure that there should be no surprises to either manager or employee; frequent communication and recorded notes make the process of reviewing a more productive experience for both.



# Summary

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The underlying philosophy surrounding feedback and performance reviews is changing. Check-ins and continuous learning and feedback are producing employees who are more satisfied and engaged within their company.

You've worked hard to attract top talent to push your company forward, but now the challenge is how best to retain that talent. Turnover is a financial drain for several reasons, including loss of skills, productivity, knowledge, and the time and resources it takes to refill that position. Per recent research by Deloitte, Adobe reduced voluntary turnover by 30% by implementing a continuous feedback culture within their company .

Not only will your company hold onto top performers, but regular check-ins will help you develop low performers. Companies without a talent management strategy waste up to 34 days each year dealing with underperformers. Check-ins will help hold low performers accountable and develop a plan of action for course correction.

Check-ins will help your company keep those top performers and develop them even further, while helping to course correct lower performers. Multiple touch points increase engagement and development, while reducing the costs of turnover and low-performers.

Cornerstone has talent management solutions for all business needs, from simple to complex. Talk to one of our experts to find the right solution for your company. [Request a demo.](#)

1. [http://www.slate.com/blogs/moneybox/2016/01/20/kill\\_the\\_annual\\_performance\\_review.html](http://www.slate.com/blogs/moneybox/2016/01/20/kill_the_annual_performance_review.html)
2. Reengineering performance management: How companies are evolving PM beyond ratings, NeuroLeadership Institute / David Rock, Beth Jones, and Camille Inge, 2015.
3. Bersin, Deloitte Consulting LLP, 2017
4. John Skabelund. "Boost Your Bottom Line with Better People Management." Reliable Plant. Accessed at <http://www.reliableplant.com/Read/198/bottom-line-management>

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