

How to Write a Performance Review: 5 Steps for Managers

THE MANAGER TRACK · EPISODE 338 CLIFF NOTES

The main messages from the episode: what the research says about who a rating really describes, the 4 places reviews go wrong, 5 steps to write a fair and useful review, and how to run the conversation when your report disagrees.

01 The core idea

A performance review tells you a lot about the person being reviewed. It tells you even more about the person who wrote it. That doesn't make reviews useless. It means your job as the reviewer is to take your own habits and biases out of it as much as you can, so the review is fair and supports the person's growth.

62% / 53%
of the variation in ratings came from the raters' own tendencies

21% / 25%
came from the actual performance of the person being rated

4,492
managers in 2 data sets, each rated by bosses, peers, direct reports and themselves

> Source: Steven Scullen, Michael Mount and Maynard Goff, "Understanding the latent structure of job performance ratings," Journal of Applied Psychology, 2000.

02 Where reviews go wrong

THE PROBLEM	WHAT IT LOOKS LIKE
1. Recency bias	You remember the last 6 weeks clearly and the first 6 months vaguely. A great spring and a rough October becomes a review that's 60% to 70% about October.
2. Your own standard	Your idea of good is how you would have done the job. If you were a detail person in that role, you rate detail-oriented people higher. That's the rater effect from the research.
3. Vague language	"Great team player." "Needs to be more strategic." Nobody can act on it, and when it's negative, people fill in the blank with the worst interpretation.
4. Surprises	Something in the review your report has never heard before. The problem started months earlier, when that feedback should have been given and wasn't.
Bonus: the thin review	Your strongest people get 2 lines of praise, since there's nothing to fix. They want to know what's next, and a thin review tells them you haven't thought about it.

High performers who see you as a ceiling on their growth, in skills or in roles and titles, will leave your team. Writing their review is often harder than writing one for an underperformer, and it's where the value is.

> **"Your high performers want to know what's next, and a thin review tells them that you really haven't thought about it."**
>
> Ramona Shaw, Episode 338

03 Step 1: Build the evidence file

Do this before you write a word. Go back through the whole review period and put everything in one place, so you can see themes across the months and beat recency bias.

- ☐ Your one-on-one notes from the whole period
- ☐ The goals you set at the start
- ☐ Project outcomes
- ☐ Messages and emails where someone thanked them
- ☐ Mistakes you discussed
- ☐ Input from 2 or 3 people who worked closely with them

ASK COLLEAGUES

"What's one thing they did this year that made your work easier?"

AND

"What's one thing you want them to do differently going forward?"

04 Step 2: Write the summary first

Before the sections and the ratings, write 3 sentences. These are also the 3 things you want your report to remember, and be able to answer themselves, when they walk out of the meeting.

1. **What this person contributed this year**
2. **The one thing that would raise their impact next year**
3. **Where you see them growing**

THE RULE OF THUMB

If you can't write these 3 sentences, you're not ready to rate them. Go back, collect more evidence and talk to more people.

05 Step 3: Write in behavior and impact

Replace adjectives with what they did and what it changed.

INSTEAD OF	WRITE
"Great communicator"	"Your weekly status notes to the operations team cut down the follow-up questions we were getting, and the director of operations mentioned it to me twice. The level of detail and the relevant information you include is working."
"Needs to be more strategic"	"In the planning meetings this year, you often brought options and ideas, but not a recommendation with your strategic view. Next year, I'd like you to come in with a recommendation and your reasoning, even if we end up choosing differently."

THE MONDAY TEST

If they read the sentence, do they know what to keep doing or change on Monday?

06 Step 4: Check your rating against your bias

We rate people we click with more favorably, especially when someone works differently from us or there's been friction. If you're detail-oriented and they're not, this is where bias shows up.

ASK YOURSELF

"Would I write this the same if someone I naturally click with had done exactly this work?"

Then compare across your team

Look at everyone's ratings side by side. If the people you like a lot, and who work the way you do, all have high ratings, that's a clear signal to take another look: challenge it, look for more evidence or talk to more people.

07 Step 5: Keep development to 1 or 2 priorities

A long list of improvement areas tells someone there's no way they'll be successful here, and it's demotivating. You can address all the points, but pick the 1 or 2 that would make the biggest difference to their next year, and tie each one to specific support you'll give.

MAKE IT COLLABORATIVE

"Out of these things, what do you believe will make the biggest difference? What are the first ones we can address?"

08 2 reviews that need extra care

Your high performer: don't stop at the praise

Name what they delivered, the stretch you see for them and what you'll do to help. That tells them you've thought about their future and you're creating visibility and stretch assignments, which keeps good people with you.

FOR EXAMPLE

"You delivered the migration two weeks early and trained the two new hires along the way. That was great. Next year, the stretch I see for you is owning a client relationship end-to-end, and I'll put you in front of the leadership team on the spring plan so they see your work directly."

Someone who's struggling: write it in plain words

Softening the language to protect the relationship deprives them of the chance to learn and succeed. If the review says "mostly meeting expectations" and 3 months later you're in a performance conversation, they'll feel blindsided, and they'll be right.

FOR EXAMPLE

"This year, your work did not meet the expectations for the role in 2 areas: the accuracy of the monthly reports and meeting agreed deadlines. Here are the specific examples, and here's what meeting the bar looks like."

09 Before you hit save

Read it out loud

Read the whole review as if you were the person receiving it. Anything sharper or vaguer than you meant, you'll hear it.

If you used AI

Make sure it sounds like you, not a machine, and still carries your specific evidence and suggestions.

Calibration

The evidence file lets you defend your ratings with examples instead of impressions. Keep it organized.

10 Run the conversation

1. **Share the written review ahead of time**
   If your company allows it, even a few hours. People react to written feedback before they can think about it. Let them have that reaction in private, so the meeting can be about the content.
2. **Start with their view, not yours**
   Ask them to walk you through their self-assessment. You'll learn where you agree and disagree, and hear what they're proud of, which might not be in your document.
3. **Say the development point plainly, once**
   Skip the softeners in front of it ("it's pretty good, there's just one little thing").

SAY THIS

"Something I'd like to see next year is you taking the lead in client conversations. Right now, you're preparing everything and someone else is presenting. And here's how I will help."

4. **Expect some disagreement and decide ahead of time how you'll handle it**
   For many people this is one of the meetings that matter to them all year. Think through the objections and defensive reactions you might get, and what you'll say in your own words.
5. **Close with the future**
   End on the 1 or 2 priorities and the support they'll get. People remember the last thing they hear, so make it about next year, even if goals get set in a separate meeting.

11 When they disagree

Don't get defensive. Stay open without folding on everything they object to.

SAY THIS

"Tell me what you think I'm missing. If you show me something that I didn't account for, I want to make sure that's properly and accurately reflected. If not, we may see this one differently, and I'd love to hear your view."

If they show you something new, take it into account. Change the review, or capture it even if it won't change the rating. An accurate picture in their HR file may not mean a lot to you, but it can mean a lot to them.

12 Your worksheet

Team member _____

Evidence file: ☐ 1:1 notes ☐ Goals ☐ Project outcomes ☐ Messages ☐ Colleague input

1. What they contributed this year _____

2. The one thing that would raise their impact _____

3. Where I see them growing _____

Development priority 1, and my support _____

Development priority 2, and my support _____

Checks: ☐ Covers the whole period ☐ Passes the Monday test ☐ Same if I clicked with them

☐ Nothing they haven't heard ☐ Read out loud

Recap

STEP	THE MOVE
1. Evidence file	Gather the whole period in one place, plus input from 2 or 3 colleagues.
2. Summary first	3 sentences: contribution, the one thing, where they're growing.
3. Behavior and impact	What they did and what it changed. Pass the Monday test.
4. Bias check	Would I write the same for someone I click with? Compare across the team.
5. 1 or 2 priorities	Each tied to the support you'll give. End the conversation on them.

13 Try this week

1. **Start a running note for each person on your team**
   Add one line after every one-on-one, or on Fridays when you look back at the week: wins, losses, opportunities, major events. You only build the evidence file the hard way once.

Keep going

The Leadership Accelerator is Archova's 12-week program for new and early-stage managers who are good at their jobs and now need to become good at leading. We go deep on feedback that's specific enough to act on and the conversations throughout the year that keep reviews free of surprises.

archova.org/leadership-accelerator **Book a Leadership Strategy Call** **Watch Episode 338**