

Reviews & Assessments

A TRAINING MANUAL PROVIDED BY



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GIVING EMPLOYEE REVIEWS

Giving your associate a review does not mean they are doing a bad job. Reviews are all about discovering and labeling behaviors that could be opportunity points for your team members as well as pointing out what they excel at. If training in the moment is our on-field coaching then reviews are evaluating the game footage and making a new strategy for the next round of games.

WHEN SHOULD I GIVE A REVIEW AND TO WHO?

First things first...who gets a review?

The easy answer is – Everyone.

From the manager to the person who comes in on Tuesdays just to help with freight processing - give everyone on your staff a review so that the process is not only fair but efficient. You want to give everyone room to see what they are doing well and where their opportunities are because it makes your overall team performance better. So, don't skip anyone!

As to when you'll need to do reviews, that's a little more varied. For the most part, you will find yourself only really needing to complete annual reviews for your staff. This will help make sure that employees are still knowledgeable of procedures and expected behaviors. You will want to check your state guidelines to ensure that you are not required to have reviews on file for any additional timeframes.

In addition to annual reviews, you may want to complete additional reviews when you have new hires or employees learning new processes or sections.

Here are some suggested time frames on when to do reviews:

| Objective | Time of Review |
|--|---------------------|
| Quick touch base. No formal evaluation form needed. | TWO WEEKS IN |

Check to see:

Is the employee ready for the next step?
Are they feeling comfortable with expected tasks/behaviors?
Do they have a general understanding of training?

Provide:

Any missing information or training.

Required in some states. Otherwise, use it as a slightly more formal check-in.

Check to see:

Are behaviors being developed that you set expectations for?
Is there something they are still struggling to master?

Provide:

Any key changes. This is the make or break point as it takes six weeks to develop a habit. Stopping behaviors at this point still gives you time for course correction!

THIRTY DAY

In some states, 90 days can be the cut point for terminating someone simply for them not working out. 90 Day reviews are also a great way to remind a new associate that their training and development matters.

Check to see:

Is the employee fitting in/enjoying their role?
Did behaviors mentioned in the 30-Day review get addressed?
Where do they see room for improvement in themselves/their position/the store?

NINETY DAY

Provide:

A sense of growth and development

A precedent for following up
Any additional training needed

This will be your primary review for all associates. It is good to have a form that you can use to standardize how this review will look year-over-year. It may be required by your state laws, so make sure you check.

Check to see:

What behaviors or accomplishments are team members most proud of?
What do they see happening in the store that can use improvement?

Provide:

What you as a manager believe they can improve on.
What you feel they excelled at that year

Use this time to identify opportunities, celebrate wins, and evaluate your partnership and communication for the year.

ANNUAL

WHAT GOES ON A REVIEW?

A review is meant to help improve or highlight performance of an employee. Therefore, you want to make sure that if you are creating an employee evaluation form that you are doing so in a way that is going to encourage your employee for the future. Give yourself the space to talk about all of the things that are important to your store and your employee's role within it, while also allowing for conversation for development.

Remember even your biggest star has something they can add to their work that could take them to new heights, so create a review that gives room to talk about everyone's progress, goals, and accomplishments.

General Ideas to Include on a Review Form:

Reviews are generally based on metrics or the method of which we measure things. For a review the easiest place to start is by taking the job description for each position and creating either a simple ranking system of how well each person in that position accomplishes what their basic position requires of them or a conversational approach to evaluate strengths and opportunities within those requirements. Many employees these days find more power in learning how they can improve rather than just giving a numbered score, so keep that in mind when creating your review form.

Beyond that, you can create your own way of measuring your employee. What values and cultures are you hoping to cultivate in your team? How do you expect customers to be interacted with? There are a wide variety of approaches to reviews.

Some base things to consider including in your review:

| Type of Metric | Evaluation |
|--------------------------|--|
| Performance Based | Does the associate meet goals set by themselves or leadership? <i>E.G. Do they maintain product knowledge? Do they help</i> |

customers in a timely/efficient manner?

Communication/Teamwork

Does the associate communicate well with customers, team members, and leadership?
E.G. Do they relay important information about customer issues? Do they work well with others?

Culture/Values

Does the associate demonstrate knowledge of company expectations and values in their daily behavior?
E.G. Are they punctual? Do they represent the brand well?

Strengths/Opportunities

What does the associate do well vs where can they see improvement in the next year?
E.G. Specific to them behaviors

Once you have a general idea of what you want to base your metrics off of for your review you can create the general outline of what you think it should look like.

Breaking the review down into the different categories makes it easier to approach each section with a clear direction, allowing you to think of examples that can support each category and specific idea that you have listed.

It's also helpful when deciding what to put on a review to consider this a time for goal setting. What pieces of the puzzle can you put together that will help you and your team members set your store up for success in the next year together?

When creating a review for your employee make sure that you include some space for both you and your employee to think of what those goals might be and how you want to continue working towards them.

For a sample breakdown of what these things might look like, check out the sample Employee Review Template below:

TEAM MEMBER PERFORMANCE REVIEW TEMPLATE:

Team Member Name: _____

Team Member Role: _____ Date: _____

| Knowledge of Job Skills | Rating/Notes |
|--|--------------|
| Shows ability to learn and apply new skills | |
| Requires minimal supervision | |
| Displays understanding of roles and responsibilities | |
| Quality/Quantity of Work | |
| Looks for ways to improve quality | |
| Performs full range of duties | |
| Meets required deadlines | |
| Customer Service Skills | |
| Asks questions to identify needs | |
| Quickly responds to help requests | |
| Displays ability to work in a team | |
| Attendance | |
| Gives notice for time off | |
| Shows up for work on time | |
| Arrives to meetings on time | |
| Initiative | |
| Fosters team collaboration | |
| Monitors personal work for quality | |
| Resolves problems early and quickly | |
| Inclusiveness | |
| Treats others with respect | |
| Displays empathy for others | |
| Includes others in team projects | |

ADDITIONAL COMMENTS: _____

Effective Language and Valuation Processes for Reviews:

Of course, there is more that goes into creating a review. Once you know how you want to structure it, you need to know what kind of language and evaluations to include on the document itself.

When filling out the review document, you want to keep the following in mind:

1. **Be Specific** - Ensure that the language you choose to use is not only specific to the person, but in the information that you give them regarding their jobs. If they don't know exactly what the behavior or task is you are referring to, they can't be expected to fulfill or improve it.
2. **Be Quantifiable** - When giving a review, it's really important to make sure that all metrics and future goals included on the review are able to be measured. Giving a general, "do better here" won't actually help a person know how or when they have completed the assignment. Keep actionable items fully capable of being evaluated as they are completed.
3. **Be Realistic** - As you give feedback and prepare metrics for your employees to hit, make sure that all goals are practical. If you expect one employee to single-handedly curate thousands of subscription orders with a less than .01% margin of error, you might be disappointed when they are overworked, frustrated, and constantly "underperforming" to your expectation. Give room for someone to deliver on a goal that is attainable, while still a bit challenging.
4. **Be Relevant** - Don't give someone a goal/metric that isn't necessary or required of them, just to have a one size fits all review. If you have an employee who only comes in to process freight once a week, they won't have a measurable goal for customer interaction or subscription management, while someone on the sales floor may not have a certain amount of boxes they need to process before the end of their shift. It's important to keep goals and metrics relevant to the employee at hand.
5. **Be Timely** - As always giving a logical and manageable time frame is key in setting expectations. And with reviews you want to make sure that your associate knows how much time they have to complete a goal or change a behavior, so make sure that's included in the process. You also want to make sure that you are only including behaviors from the time frame of the review dates as listed.
6. **Be Effective and Supportive** - Your language, as well as the information included, should be able to support the growth and development of your team members. This isn't a chance to merely harp on things you don't like about a person, this is how you

improve your store's performance and culture overall. Use positive language, and provide quality suggestions and celebrations that will build everyone up in the long run.

HOW DO I DELIVER A REVIEW?

Preparing for the Review

Remember that an annual review is a lasting thing. Associates take what you say to heart so make sure that you come into the review prepared and give them a quality assessment that they can use to improve their performance and celebrate their wins.

Before the review be sure to do the following things:

1. **Review the job description** - Look over the job description you gave your employee and think of a specific example of how they met each objective on the description. Take notes so that you can call out these experiences when you meet.
2. **Evaluate strengths and opportunities** - Make a list for each associate of what they have done really well and the areas that you think they could use improvement in. For each thing try to think of an example you can use from their work experience that showcases why you feel this way. Remember to highlight things that employees did that may have been above and beyond their job expectations.
3. **Self-assessment** - If you are planning to have your employees do a self-assessment for their review, have them fill these out prior to writing the review so that you can use that in conjunction with your own notes when making your rounded assessment of the situation
4. **Manager Notes** - If you are doing the reviews as an owner and you have a manager on your staff as well, you should confer with them on what their thoughts are based on what they see. Be sure to check employee files for any write-ups, coaching notes, touch base information, etc to see if there has been any progress on previous conversations that you can highlight
5. **Write the review** - Use all of your notes and write your review. Be thorough in your examples and descriptions so that you associate is able to understand and follow up on anything they need to.

Delivering the Review

1. **Find a quiet, comfortable place to hold reviews** - Don't hold reviews on the sales floor! This is a private conversation between you and the associate you are reviewing. Give them a blocked off amount of time in a quiet, comfortable place so that they don't

feel like others are a part of the conversation. Reviews already make a lot of people feel like they are being judged, you want your associates to know this is not the case. You are having a conversation that is about celebrating wins and developing the store at large, this includes them on an individual level.

2. **Start with laying expectations** - Let your employee know what you are going to be discussing (job description, their self evaluation, performance metrics, etc.). Make sure they know what to expect from the conversation right away so that they are in the right headspace for the information being delivered.
3. **Review the job description** - Much like you did before you wrote their review, go over what the agreed upon expectations were when they accepted the job. Ask them how they feel they met those expectations, use the self-assessment (if they did one) to further that conversation.
4. **Review the performance metrics** - Whether this is sales numbers or behavior based metrics, review each item listed on your assessment in detail showcasing the examples that you listed down
5. **Highlight learning opportunities** - The point of the review is to grow your associate and your store as a whole, and in order to do that you need to provide the necessary educational pieces. When discussing the opportunity areas with your associate, point out the behavior and ask them what they see in it?

E.G. "You seem to have less knowledge of the current books on the shelf, why do you feel that is?"

Asking questions may give them the chance to discover a break in their training or daily routine they haven't seen before.

You can also try a direct approach of saying something like,

"I've noticed you aren't spending as much time on product knowledge recently, I'd like to challenge you to read one new book a week and make a staff rec card to highlight what you read."

6. **End on a positive note** - You want your employee to be happy about their experience working with you. Happy employees perform better. Talk about how their work supports your goals as a company or a major win they had this year. Give them something to feel good about.
7. **Follow up** - Plan for any follow up that you will be doing with them in the moment so that everyone is on the same page of when that will happen

WHAT DOES FOLLOW UP LOOK LIKE?

Follow up for a review isn't always necessary. If someone met or exceeded expectations in every category, you aren't going to schedule a follow up review to see if they are still doing great...though you should keep an eye on them as much as anyone to see that they maintain performance. However, if someone has some opportunity areas that you discuss during a review you will want to make sure that you have scheduled follow ups. What does that look like?

Additional Training

If someone is struggling it could be that they need additional training. Maybe they never got a concept or perhaps they've developed a bad habit and need to break it.

When giving your associate their review, give them a training plan that can help them recover from this, don't leave them to figure it out on their own. Perhaps they need to revisit a training module, or maybe there is someone who exceeded expectations in the same area that you can pair them up with to learn from. Give your associate the tools and the expectations for how you would like to see them fix the behaviors.

If you have a certain amount of email sign ups you expect your associate to get a week and you've noticed they don't ask anymore - find out why during your review and make a plan for what they can do to repair that behavior. Outline the plan in detail so that they know exactly what is expected of them during this time period.

30 Day Follow Up

If there were action items on a review you need to schedule a follow up. The best plan is to complete a follow up 30 day review. As we mentioned earlier, six weeks is the time period it takes to create a habit, so catching your employee at the 30 day mark will give you time to see if the behaviors are changing.

Much like with the regular review, host your follow up in a quiet, comfortable place. Review the expectations and then discuss what behaviors you see and what they have accomplished.

If the behaviors are improving, great let them know that you will continue to work with them and watch them but no further action is necessarily needed.

If the behaviors are not improving, decide if there is something missing in your training with them or if they simply do not wish to correct the behaviors. You can continue to expand on their development program or determine if maybe they are not in the right role and take action from there.

WHAT IF I NEED TO TAKE ACTION BEFORE A REVIEW?

Sometimes big things happen that need to be addressed right away. You've tried coaching in the moment, but behaviors aren't changing. Maybe the associate just blatantly does not want to work within the mission of the store. You don't have to wait for a review to have a sit down conversation with someone. And while no one wants to be led by fear and the idea that counseling and write-ups exist, you do need to know what to do if that situation arises.

Touch Bases

When coaching in the moment doesn't seem to be getting through, but you know the associate is trying their best, try having a sit down with them.

Maybe they are consistently late to work and you've had a couple of quick floor chats with them about how it impedes on everyone's work day when they are late, but you find them still showing up late for the next shift. Have a one-on-one with them in the backroom where you have a chance to go more in-depth about what the underlying issue is. Are they unhappy with their job? Do they have a school schedule that is overwhelming them and causing them to come late but they don't want to risk losing the job by saying they can't make their scheduled shift at the exact time?

Giving them a chance to dive deeper into the issue with you and seeing if you can fix it is a great way to show your employee that you do care but that you are also working to ensure that the entire store is working at full capacity.

Write Ups and Counseling

No one wants to be the bad guy, but sometimes there will be situations where you have to. An associate is repeatedly rude to customers or insubordinate. Behaviors continuously don't change and product is getting damaged or missed because of it. A myriad of things can happen.

In these situations the tough conversations have to be had and a write-up must be documented. Creating a written document that your employee signs that shows that you had the conversation, they agreed to change the behaviors, and what actions could be taken in the

future if they do not is not only important to have so that you can call back to it for the associate if the behaviors do not improve, but could be legally required for you to terminate the employee in the future. Check your state laws for termination requirements to ensure that you are following them to the letter.

PRACTICE & EXERCISE

Instructions: Using the information learned, think about how you can implement or improve upon reviews in your store to help continue the development of staff members and store overall. With that information in mind, complete the following exercises.

Exercise 1

Instructions: Review the following statements. How could you improve them to provide a better performance evaluation for your team members? Remember to consider that your assessment should be specific, measurable, attainable, relevant, and timely.

Statements:

1. You're unable to meet deadlines and you are always late.
2. You do a good job.
3. You are careless in your performance causing you to make mistakes.
4. I was really annoyed with how you handled that customer situation.

Exercise 2

Description: Create a list of definable metrics for your store. What tasks/behaviors would you like to see staff members demonstrate? Using that list, create a template for future reviews.

Questions to ask yourself:

1. What are the job requirements for each position?
2. What should customer service look like in the store?
3. Are there certain daily/weekly tasks that associates are required to complete?
4. What should communication between team members look like?
5. How important is attendance/punctuality for team members to be successful in their role?

CONCLUSION

While reviews and assessments are not necessarily required in every state, they are a great way to keep your finger on the pulse of how your team is doing and more importantly, how they are feeling. Completing annual reviews helps you to see where new or repeated training might come in handy on an individual or store-level basis. Consider this your State of the Union moment, and it's up to you to talk to each of your team members to figure out what you need to focus on in the coming year to ensure that you are all successful together.

For more information on in the moment evaluations, check out our guide to Coaching and Counseling.