



The 2023 Performance Review Playbook

[Template]

Design principles and considerations for your 2023 performance review playbook



Objective

Goals | Feedback | Coaching



Organizational Network

Self | Peer | Manager | Upward



Frequency

Annual | Bi-annual | Quarterly | Project-based/Continuous



Form Design

Question text | Weights | Rating scale



Criteria

Overall markers | Goals | Competencies



Calibration

Calibration pillar | Calibration committee | Rating distribution



Timeline

Completion window | Business season/timing



Objective

Why do performance reviews? To increase talent density, use data to inform compensation, clarify growth opportunities, or something else? Don't focus on just one part and ignore the rest.



Frequency

Quarterly is ideal, given a fast-changing business landscape. Give feedback in real time through 1:1s to create momentum and dialog.



Criteria

These are your goals, competencies and overall markers. What got done and how? Keep it simple.



Timeline

Consider aligning your performance review process to the financial year, goal-setting cycle, and budgeting process.



Organizational Network

Harness feedback through networks. Let people choose who they want feedback from. Build safety so people can give feedback in real time.



Form Design

Keep it short and easy. Encourage big-picture inputs. Tie it into what the next quarter will look like.



Calibration

Define what great performance looks like, to minimize bias. Develop leaders' capacity and capability to assess talent.



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