



WEEKLY10 CUSTOMER BEST PRACTICE GUIDE



# Having Effective Performance Conversations

Whether it's a performance appraisal, 1:1 meeting, a probation review or something else, it's important to know how to have an effective performance conversation.

# Come in, sit down. Let's talk about performance.

Reviews, appraisals, evaluations...

Whatever you call them, performance reviews are the foundation of performance management. The only problem is, they aren't effective. Well, the way they're traditionally run, isn't effective at least.

*95% of managers and 80% of employees feel traditional performance reviews are ineffective.*

But run the right way, performance conversations will help employees thrive. They encourage employees to drive their own progress and ask for help when they need it.

Performance conversations give managers a better understanding of how they can help their people to improve their own performance and overall contribution.

This guide is designed to help you in two ways:

1. Highlight the importance of great performance conversations, what they look like and what to avoid
2. Help you run epic performance conversations with Weekly10

Let's jump in.



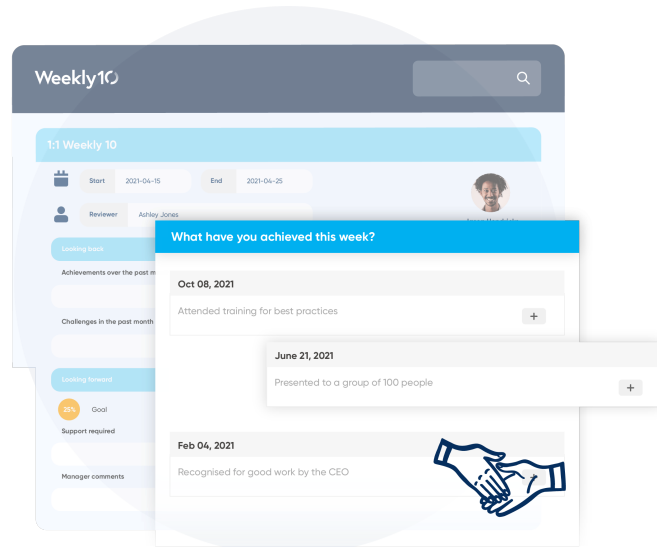
# What is a performance conversation?

A performance conversation is any 1:1 meeting between a manager and an employee which is focussed on, you guessed it, performance.

That can be a classic performance review, a 1:1 catch-up, a probation evaluation or any other type of 1 to 1 meeting you have with your team.

But why do we call it a performance conversation?

Well, there are three main reasons.



## Conversations keeps things simple

Things get lost in translation, and for global businesses, it's important that everyone understands what's meant. Whether you call them reviews, appraisals or evaluations, all should be (when run correctly) conversations.

## Conversations better describe how performance meetings should look

All too often this type of meeting becomes a case of manager dictating to employee. That's not how effective performance management works. Performance-related meetings need to be an open and honest conversation between those involved.

## Traditional performance tools and terminology have a brand issue

80% of employees see little benefit to traditional reviews. 95% of managers are unhappy with existing performance tools. Moving away from traditional language can help freshen up perspectives on what great performance management can look like.



# It's no secret. Traditional performance reviews don't work.

By traditional performance review, we mean those annual sit downs between a manager and employee with little else going on in between.

You know the ones, past performance is scrutinised, something resembling goals is discussed, then nothing really gets reviewed for another 6 or 12 months.

Sounds like a relic? Nope! Gallup predicts that 60% of companies still use the annual review as their only performance management tool.

And the stats for traditional reviews paint a terrible picture:



77% of HR professionals believe their company's performance management tools and processes aren't an accurate representation of employee performance.



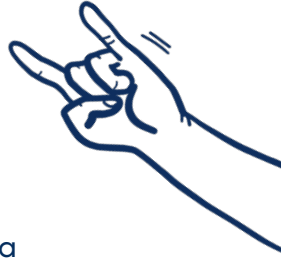
8 in 10 employees feel current performance reviews are at best 'average' at improving their performance and future development. .



95% of managers are unhappy with the quality of performance reviews within their business.



# Continuous performance is key



Weekly10 encourages employees to focus on their performance each week through the Weekly10 check-in. Making small tweaks is a lot easier than huge mindset or process shifts once a quarter. That's achieved by getting regular feedback from their manager.

Let's compare the old way of doing it with the right way of doing it.

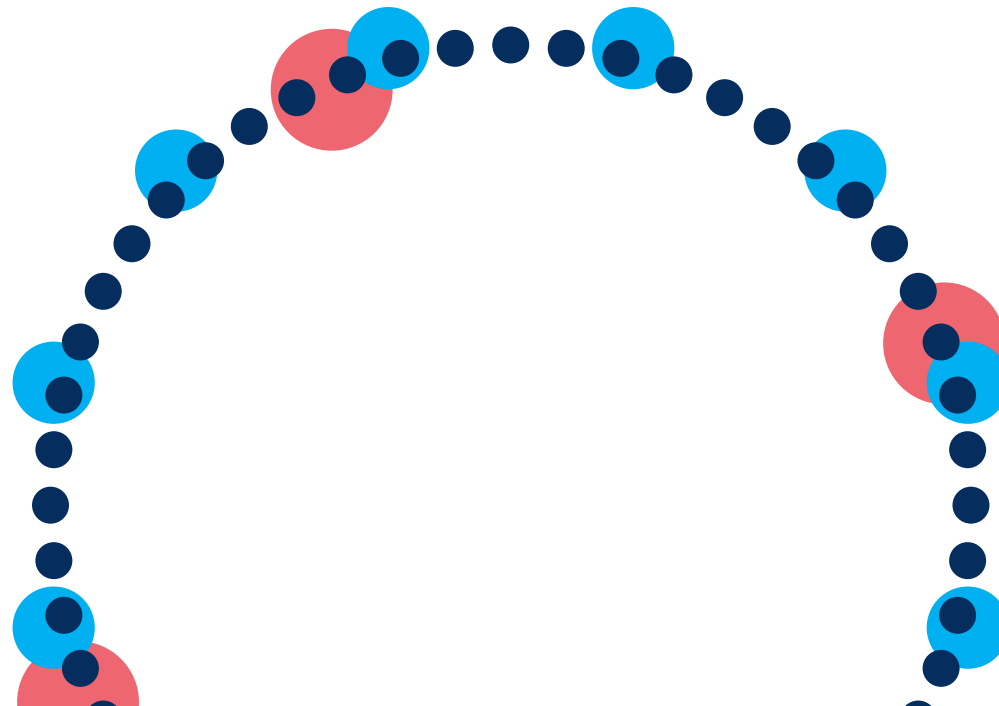
Approach	Frequency	Focus	Evidence	Goals
<b>Traditional performance reviews</b>	When it suits the business and its revenue cycles	Past performance is interrogated	Best guess and "as I remember" moments	Set and forget until the next review
HR driven. Based on one-size-fits-all templates and timescales.	Big gaps between meaningful conversations leads to anxiety, missed issues, ineffective feedback and outdated targets..	Too much time is spent on un-timely feedback about things that are too late to change or have an impact.	Mass scramble to find files, notes and emails to base discussions on. This creates issues with accuracy and biases.	Goals often set then not reviewed by anyone until the next review. Leads to wrong and lost priorities.
<b>Continuous performance</b>	Employee-led for best impact: little and often	Future-focused performance	Employee led feedback and goal updates	Set, review and amend
Employee/manager driven, HR owned. Everyone feels/sees direct benefits.	Frequent performance touch-points means issues are tackled early and wins are celebrated often.	Challenges are dealt with and support offered in real time, when it matters. Focus is now on more forward-thinking topics.	Evidence is auto-populated from employee check-ins, meaning less issues with biases or ambiguity.	Check-ins and monthly 1:1s keep goal progress centre-stage, with more agile OKRs.

# What an effective conversation cycle looks like

Whereas traditional performance reviews were a once-a-year deal, performance conversations are more frequent but lighter touch. They become a coaching session rather than a point-and-shoot.

Yes, a performance conversation should happen annually at the very minimum but there also many other conversations which could and should happen in between. Conversations such as 1:1's, goal setting, quarterly reviews and even probation reviews, all supported by Weekly10 are also key.

Here's what a typical 12 month performance conversation cycle could look like with the Weekly10 approach to continuous performance management:



## Frequent check-ins

- Focused on day-to-day successes and challenges
- Two-way feedback to support and reinforce development
- Support and develop
- Everyday performance



## 1:1 conversations

- Reflective feedback
- Looking forward
- Career progression
- Automated prep work



## Goal-setting and reflection

- Strategic performance conversations
- Support employees to drive self-development
- Alignment
- Appropriateness and relevance

# How to have more effective performance conversations

By using Weekly10 you've already started to move away from traditional performance approaches 👍 Whilst a performance conversation takes an hour or less, great managers do the legwork throughout the year to make these sessions effective. Here are 8 top tips:

01

## Ask the right questions

It may sound simple but asking questions that help improve the quality of a performance conversation is an art.

How many times have you asked or been asked a question in a performance conversation that felt leading or like a tick-box exercise?

Ensure questions you ask during your sit-down are relevant and have a purpose.

Use the Weekly10 question bank, or our conversation templates to help build a better performance session.

02

## Focus on regular feedback

The Weekly10 check-in is a structured way to capture your people's achievements and challenges as they happen, as well as feedback from their peers through recognition @mentions. That makes it the perfect tool for supporting great performance conversations.

The Weekly10 check-in also encourages your people to update their OKR or Goal progress so they're focused on the things that matter to them, the team and the business.

Everything recorded in a check-in can be automatically populated into a conversation so time isn't wasted gathering evidence. Reviewing the regular feedback provided helps support a more effective conversation where focus is on what really matters.

Ideally, we'd suggest running a weekly check-in to keep things timely. If you need help implementing a weekly cadence, please give us a shout, we're here to help.



### 03

## Automate where possible

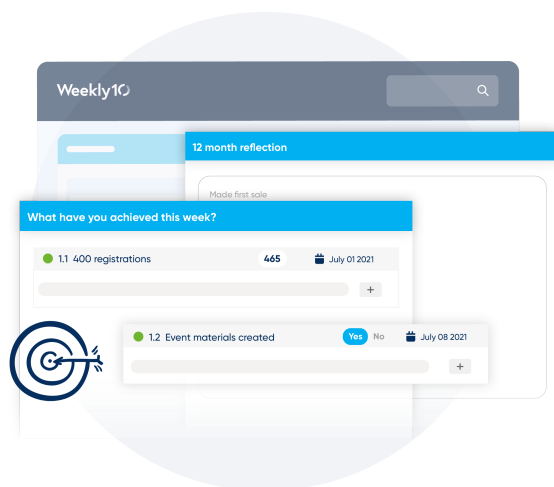
Weekly10 Momentum customers have access to performance conversations as part of their subscription, including a tonne of automation.

You can pull employee feedback, goal progress, or question responses from custom dates into your next performance conversation. All at the click of a button.

For Office365 users you can also ask Weekly10 to talk to your calendar and book the 1:1 meetings for you.

This not only makes things stress free when it comes to prep work, but it allows you to build a focussed and tight agenda.

Ask your Customer Success Partner about the range of performance conversation templates available or check out our product support site.



### 04

## Build a collaborative agenda

Key to a great performance conversation is a plan.

Review your employee's Weekly10 check-in history for red flags or talking points. Build an agenda that encourages discussion rather than one-way questioning.

Share the agenda well in advance of any actual conversation taking place. Remember the whole point of these sort of meetings is to help your people develop and grow. It's hard for them to feel able to do that if they aren't involved throughout.

An agenda mean things stay on track. Post conversation it'll act as a useful reminder of the discussion and follow-on actions.

You can easily review feedback captured in Weekly10 to help pull together a killer agenda that will lead to a great performance conversation.



05

## Look forward more than back

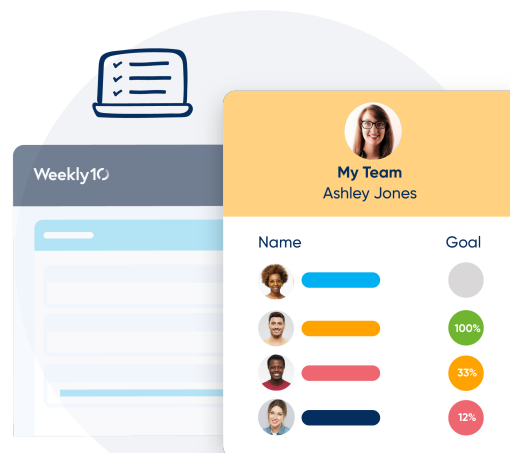
Looking back to learn from past efforts is important. But far too many managers spend far too much of the meeting focussed on past performance.

The Weekly10 check-in is your tool for day-to-day reflections and incremental improvement. Performance conversations need to be more future focused.

Aim to spend at least half of the discussion talking about and planning for the future.

When creating a performance conversation in Weekly10, we typically recommend having at east these two sections:

- Looking back
- Looking forward



06

## Embrace continuous performance

Traditional reviews don't work. That's because they're untimely, based on anecdotal recollections, and are impacted by all manner of biases.

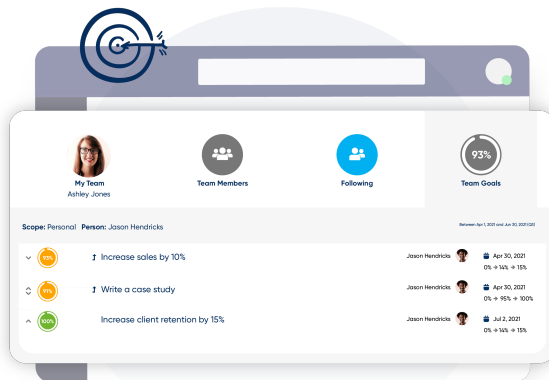
Use a Weekly10 check-in and monthly 1:1 meetings for day-to-day feedback and guidance. These support the more formal performance conversations.

They provide evidence for reviews, remove potential biases, and allow for more timely discussions with your people. They also reduce the probability of nasty surprises to either employee or manager during the discussions.

Every company is different.

We recommend a performance cycle that uses:

- A weekly check-in
- A monthly 1:1 meeting
- A quarterly or bi-annual performance review



## 07 Set goals and review often

Whether you use Goals of OKRs, they should be clear, aligned with larger company objectives, and easily measured. They need to be discussed and agreed during performance conversations. It's also important to support your people to develop a plan around how they can achieve them, as well as any support they may need to be successful.

Priorities can change at the drop of a hat. Review goals frequently to ensure relevancy and help guide your people.

Weekly10 Momentum users can set goals as part of the check-in process. This improves goal-setting effectiveness and powers better performance.

## 08

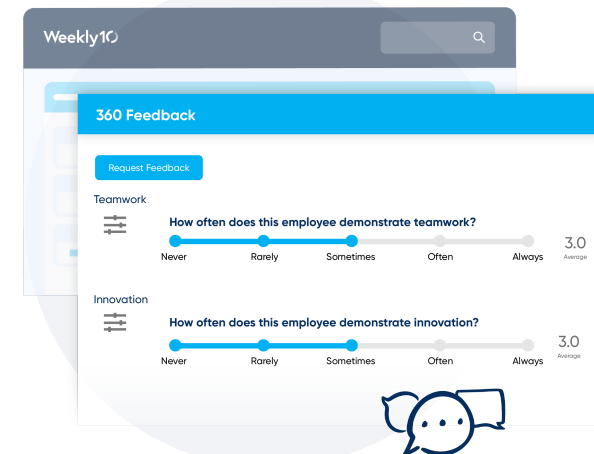
## Use 360 feedback

You're only human (we hope). You can't be everywhere and see everything that happens with your employees. This is even more true in a hybrid, remote, and flexi working culture.

360 feedback helps paint a more detailed picture of the work, efforts, and successes of your team members.

Peers, other team members and even suppliers or customers can provide 360 feedback to give a more holistic view of your people's strengths, weaknesses, and contributions. This makes the performance conversations much more effective.

Use ad hoc or regular 360 feedback to build a holistic view of your employees. You'll find these under the conversations templates menu.



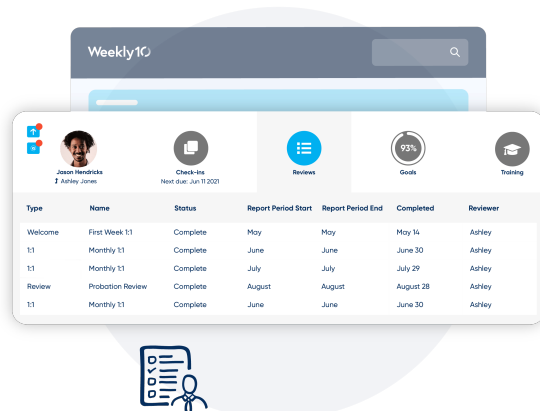
# 3 Steps to creating basic performance conversations in Weekly10

The performance conversation tools in Weekly10 have been built to be super-flexible. That's because we know that every company is different.

Whilst that's great, it does mean there are a lot of options to choose from and potentially get lost in.

Thankfully, it's far simpler than it can sometimes look. And we're here to help if you do get lost.

Let's run through setting up an end of year performance conversation template that you can use year on year once it's been created.



01

## Choose your template

- Surveys
- Quarterly reviews
- Annual review
- 1:1 meetings
- Ad hoc conversations
- Probation
- Feedback
- Fast-track talent
- Underperformance
- Or create your own

02

## Populate your template

- Use as is, or edit any template to better suit your need
- Build your own from scratch
- Custom workflow features such as stages, notifications and Office365 support make the conversation flow and maximise effectiveness

03


## Create your plan

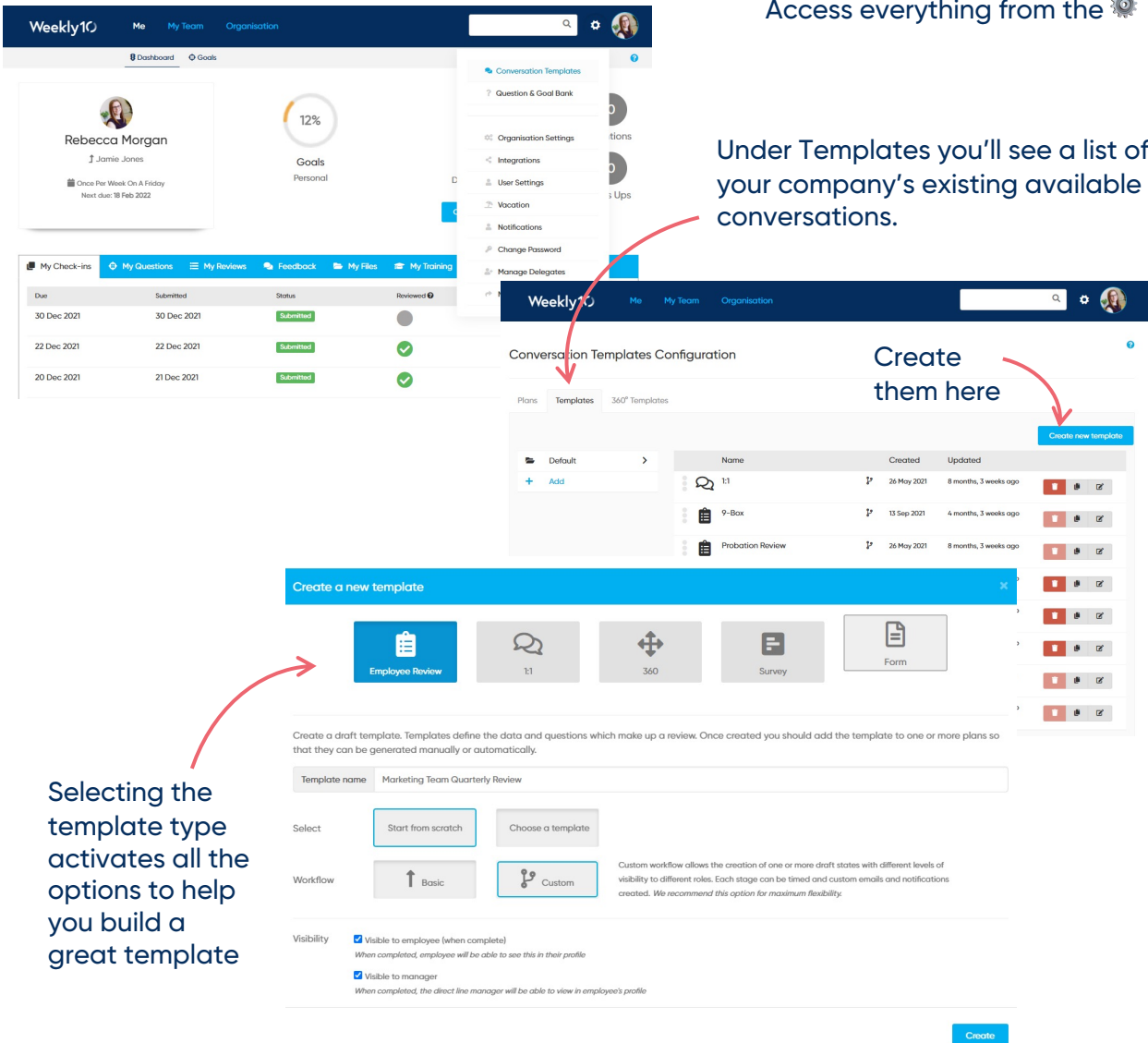
- Set the cadence and triggers: ad hoc, specific dates, repeating, employee start date, and more


# Choose your conversation template

01

## Choose your performance conversation template

1. Click the  next to your profile picture.
2. Select **Conversation Templates**.
3. Under Conversation Templates Configuration, select the **Templates** tab.
4. Select the **Create New Template** button.
5. Select **Employee Review**.
6. **Name** your Template.
7. Select **Start from Scratch** to activate your Workflow types.
8. Select **Custom Workflow** for maximum flexibility later on.
9. Review and adjust visibility settings.
10. Click **Create**.



Access everything from the 

Under Templates you'll see a list of all your company's existing available conversations.

Create them here

Selecting the template type activates all the options to help you build a great template

**Weekly10** Me My Team Organisation

Dashboard Goals

Rebecca Morgan  
Jamie Jones  
Once Per Week On A Friday  
Next due: 18 Feb 2022

12%  
Goals  
Personal

My Check-ins My Questions My Reviews Feedback My Files My Training

Due	Submitted	Status	Reviewed
30 Dec 2021	30 Dec 2021	Submitted	
22 Dec 2021	22 Dec 2021	Submitted	✓
20 Dec 2021	21 Dec 2021	Submitted	✓

Conversation Templates Configuration

Plans Templates 360° Templates

Create new template

Name	Created	Updated
1:1	26 May 2021	8 months, 3 weeks ago
9-Box	13 Sep 2021	4 months, 3 weeks ago
Probation Review	26 May 2021	8 months, 3 weeks ago

Create a new template

Employee Review 1:1 360° Survey Form

Create a draft template. Templates define the data and questions which make up a review. Once created you should add the template to one or more plans so that they can be generated manually or automatically.

Template name Marketing Team Quarterly Review

Select Start from scratch Choose a template

Workflow Basic Custom

Visibility ☒ Visible to employee (when complete)  
When completed, employee will be able to see this in their profile  
☒ Visible to manager  
When completed, the direct line manager will be able to view in employee's profile

Create

# Populate your conversation template

02

## Populate your performance conversation template with sections and elements

1. Select **Add New Section**. Call it **Looking Back** and select who should be able to see it: Employees, Reviewers and Admins is the default. Select **Create**.
2. Select **Add New Element**. From the drop down menu, select which type of data collection element you'd like to appear. Add as many of these as needed.
3. You can **re-order the elements** within each section by dragging and dropping the line items. You can re-order the sections in the same way too.
4. **Repeat** these steps for each new section.
5. When you're ready, click **Back to Templates** and we'll schedule the plan.

Weekly10 Me My Team Organisation

Editing: Marketing Team Quarterly Review [Click to preview](#) [Edit](#)

[Back to templates](#) [Custom workflow](#) [Edit](#)

[Back to Templates](#)

[Add new section](#)

[Add new element](#)

Looking Back

A reflection on your last quarter's progress

360° feedback request editor and responses will appear here

360 Feedback [Select](#)

9 questions in feedback template

Employee recognition (mentions and pass-ups) will appear here

Employee question responses for: "What has gone well this week?" will appear here

On a scale from 1-4, 4 being highest, how well do you think you met your own expectations

[Add new element](#)

Sections group discussion areas, for example looking forward or back, goals or personal development.

Elements are really flexible. They can include Weekly10 check-in updates, free text, OKRs and Goals, Ratings and 9-box talent mapping, 360° feedback, and more.

[Add new element](#)

Looking Forward

Manager's comments

[Add new element](#)

[Add new element](#)

Goals

Future goal plan will appear here

In progress goals will appear here

[Add new element](#)

[Add new Section Elements](#)

# Create your conversation plan

03

Create your performance conversation plan to bring everything to life!

1. Under Conversation Templates Configuration, select the **Plans** tab.
2. Select the **Create New Plan** button.
3. Give your plan a **name**.
4. Select which **departments** can use your template.
5. Choose the **template** you've created.
6. Decide when the plan should run, how often, and the time period the conversation should cover. For example, an annual review may have a start date of 1<sup>st</sup> Jan and end date of 31<sup>st</sup> Dec with a launch date of 1<sup>st</sup> Jan the following year.

Weekly10 Me My Team Organisation

Dashboard # Tags Departments ? Questions Goals Conversations Manage Reports

Plans tab

Conversation Templates Configuration

Create New Plan

Plans Templates 360° Templates

'Live' templates will be used for all employees within the specified department(s).

- Ad-hoc reviews can be created at any time by a manager or administrator from an employee's profile
- Scheduled reviews will be created automatically by Weekly10 on the generation date

Create new plan

Name	Department	Template	Status	Frequency	Next Run
...	...	...	...	...	...

Create a new review plan

Create a draft review plan. Plans define when and how a review is created from a template. You can choose for Weekly10 to generate reviews automatically on a fixed or flexible schedule or allow managers to create reviews on an ad-hoc basis from an employee's profile.

Plan name Global Marketing Team Qtrly Reviews

Departments \*Sales & Marketing

Template Marketing Team Quarterly Review

Templates define the data and questions within a review. Create a template before a plan.

Key Statistics (optional) \*Personal reflection score

Key statistics will appear on the dashboard for this review plan.

When would you like the reports to be run?

☐ Ad-hoc  
Allow creation of this workflow on an ad-hoc basis

☐ Specific dates  
Create a schedule

☒ Repeating  
Run at regular intervals

☐ Employee start date  
Create review on employee's start date

Cadence Monthly Every 3 month(s) Starting from 2022-01-01

☐ Day of month

☒ Week of month

On the First of the month

Monday of the month

Each report will cover a period of 3 months prior to the scheduled date

If you want the review to be used by a specific department(s), select it in the dropdown. Otherwise, leave it as the default.

Set the cadence and triggers: ad hoc, specific dates, repeating, employee start date.

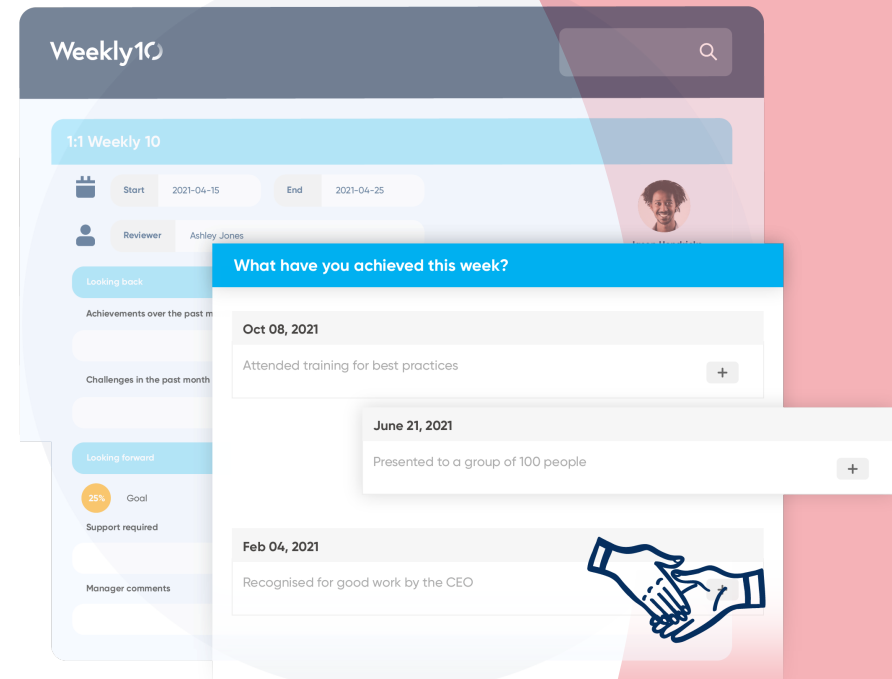
## Performance Conversations in Weekly10

Effective performance conversations are easy to plan, run and action in Weekly10. We're here to help you get started.

If you're interested in knowing more, contact your Customer Success Partner or check out our conversation support pages.

If you're already running conversations in Weekly10 but would like any support at all, please reach out.

We're here to help.



For industry insights, head to [weekly10.com/resource-hub](https://weekly10.com/resource-hub)

For product support, head to [weekly10.com/support](https://weekly10.com/support)