

Providing Performance Feedback Exercises

(Updated: June 16, 2017)

Discussion Questions

Please be prepared to provide written responses and/or discuss the following questions:

- 1) Why are employees tense when it comes time for a performance review?
- 2) Why is it important for there to be "no surprises" on a performance review?
- 3) Let's say you worked for a small business. A fellow employee comes up to you at a break and says: "I just got my performance review. The boss just said I had a bad attitude with customers and that I didn't work effectively with other employees. This is the first time I've ever heard any of those complaints. I'm really unhappy!"

What do you think the business owner did wrong in this situation? How could the business owner have avoided this situation?
- 4) Why is it important for a boss to listen when he / she is giving a performance review to a team member?
- 5) Do you think that employees really *do* get emotional during performance reviews? What should the boss do if an employee gets upset during a performance review?
- 6) You're a small business owner. You terminate an employee because he is frequently late to work or absent. During the meeting where the employee is being terminated he says: "I know there are things you could do to make your employees happier and make this company a better place to work." Should you, as the business owner, let this employee you just terminated talk with you about your company? Why or why not?

Short Essays

- 1) Jan is a terrific employee in every way but one - *Jan keeps showing up late*. On the days Jan has the opening shift, this means the store opens late. The landlord has complained that your lease indicates a \$500 penalty every time the store opens late, and threatens to impose that penalty the next time this happens. On the days where Jan comes in during the late afternoon, other employees have to stay late covering for Jan - one of them was late for a final exam at night school and was angry because her grade was lower than she wanted in that course.

As the business owner, write up a short performance note providing feedback and action steps to Jan. Make sure to: a) start with the headline; b) be direct; c) use specific examples; d) use caring words.
- 2) Robin just handled a customer complaint in the most effective way imaginable. The customer was very angry with the work your repair shop did on his car. Robin drove to the customer's house . . . listened as the customer pointed out the work he believed was poorly done . . . opened up the shop five minutes early the next day to let this customer get his car in early . . . ordered a Lyft to get the customer to work . . . and then delivered the car to the customer's workplace when the repairs were re-done correctly.

As the business owner, write a performance note to Robin on what just happened.
- 3) You want your business owner to agree to a "boss performance review" as described in class. Write a short note letting your boss know why you think this is a good idea, and how the business will benefit if she agrees.

Role Play 1

Have all class members review the bullet point profiles of a business owner and an employee.

Business Owner	Employee
<ul style="list-style-type: none"> • Business is successful, but competition is tough • Believe you're a fair boss, but a demanding boss • Want your employees to enjoy their job • Want your employees to be proud of their company • Want to be number one in customer service • It's time to give annual performance review. This employee is a strong employee, particularly in terms of customer satisfaction and working effectively with others • You believe this employee has the potential to be a manager, but you're not sure if the employee is motivated enough to accept a supervisory position • Your night shift supervisor (the third employee you ever hired!) is set to retire in 18 months 	<ul style="list-style-type: none"> • You've worked at this company for three years. You believe you're a hard-working employee • Other employees confide in you when they're unhappy - you're a leader • You enjoy your job but think the boss could be more flexible when employees make small errors (like showing up late or forgetting to follow up with a customer) • You're not sure what you want to do in your career. You like this job, but you're not sure this is the absolute right job for you in the long-term • You're not sure if you want to be a supervisor. You're not sure the extra pay is worth the extra responsibilities • Your car needs to be repaired, but money is a bit tight right now
<p>The business owner is scheduled to provide an annual performance to this employee at 4pm today, just before quitting time.</p>	

ACT ONE

Have one team of classmates prepare a bullet point performance review as if they were the business owner.

Have a second team of classmates develop a set of bullet points that reflect what they believe the boss will say to the employee in the performance review.

Have a third team of classmates develop a bullet point list of what they believe will happen during the performance review: a) what agreements or disagreements the business owner and the employee will have during their performance review; and b) what action steps you think they will agree to pursue.

ACT TWO

Select one member of the Business Owner team and one member of the Employee team. Have them come to the front of the room and hold this performance review. Have a member of the third team take notes about: a) what the Business Owner did well and did poorly in the performance review; and b) what the employee did well and where the employee acted ineffectively or inappropriately.

Rotate class members after a few minutes so that there are several different business owner / employee combinations.

ACT THREE

Have the observers indicate what they believe went well and went poorly in each business owner / employee review. After the observer is done, have the business owner and employee talk about what they felt during the review.

Ask other class members what they believe went well and where the owner or the employee could have been more effective.

Role Play 2

Business Owner: JJ has showed up for work late again. This is one time too many as far as the business owner is concerned. JJ shows up late for work too often and is setting a bad example for the other employees. As good as JJ's job performance is in other areas - and especially since JJ has the potential to get promoted and move forward to supervisor positions - this chronic tardiness must stop. *Unless JJ can guarantee that this lateness habit will end, you feel that you'll need to terminate JJ.*

Employee: you have a younger brother and sister that need to get ready for school in the morning. Sometimes you're the only one around to help them get dressed, get fed and get to the bus. You work hard and you do a good job. You're reliable, honest and a good team member. It shouldn't matter if you show up late once in a while. You find it annoying and get irritated when people nag you about being a few minutes late more or less, especially since you're a really good person who works hard and means well.

Human Resources (HR) Director: you serve the business owner. You also help with performance reviews and documentation. You like JJ and believe this lateness habit is a sign of immaturity that JJ will eventually grow out of. You know JJ's family, and you know how JJ is a solid citizen, always helping the younger kids and helping to support the grandparents.

Situation: JJ was late again, on a Tuesday morning after a long weekend. The business owner wants to have a "warning performance review," indicating to JJ that a failure to be on time will be grounds for dismissal. The objective of the review is to help JJ change this behavior. JJ shows up for work 10 minutes late on Tuesday and hears from the HR Director that there will be a meeting at the end of the day with the three of them: the business owner, the HR Director and JJ.

- 2a) Select class members to play each role. Have these class members work together to develop bullet points indicating: 1) what they want to accomplish in the 4pm meeting; 2) what they will say in the 4pm meeting; 3) what they think will be a successful outcome; and 4) what they believe will be will be a failed outcome.
- 2b) Select one class member in each role to hold this 4pm meeting. Have the other class members take notes about what is happening - who is doing well, who is doing poorly, what could be done to create a positive outcome.

Rotate new class members into each role during the meeting.
- 2c) If there was any conflict during the meeting, make sure class members take notes about what happened, and whether or not each individual acted / reacted appropriately.
- 2d) Debrief. What went well? What could have gone better?