

HR Toolkit:

How to Elevate your Performance Management Process

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What we'll do today!



1

Understanding the
Performance Review
Cycle



2

Supporting your team
and managers with
the performance
review process.



3

Jumping into action

What is the current pain point in your performance review cycle?

- A. It feels like a compliance/admin task.
- B. Managers dread the conversations.
- C. The feedback is vague or biased.
- D. There is no link to future development.



The background is a deep blue gradient. On the left, there's a circular pattern of concentric lines with various icons: a Wi-Fi symbol at the top, a gear, a puzzle piece, a bar chart, a dollar sign, and a speech bubble. Binary code (0s and 1s) is scattered throughout. On the right, a man's profile is shown in silhouette, facing right. A vertical white line separates the left side from the right. A yellow circle with a white center and the number '1' is positioned on the white line.

1

Understanding the performance review cycle

Why it matters!

we spend **210** hours on a process that

95% of managers are dissatisfied with

and only **20%** of employees find motivating

The performance management PEAR



Stage 1: Plan

“Clarity precedes success”

- Robin Sharma



WHY

Connect individual goals to the company strategy. Employees are more engaged when they see how their work contributes to the bottom line

As customer success agent, you directly influence renewability by keeping our response time below 2 hours.



WHAT

Move beyond measuring input and define **SMART** outcome focussed goals.

(Specific, Measurable, Achievable, Relevant, Time-bound)

Maintain an average response time of below 120 minutes during off-peak hours and below 60 minutes during office hours.



HOW

It's not just what we do, but how we do it. Create or connect company behaviours to goals.

Maintain a CSAT score of 4.8/5 by using positive language frameworks in all your customer interactions.

Stage 2: Engage

Where traditional performance management goes to die!



CONTINUOUS

Frequency is more important than formality. Encourage shorter but more frequent check-ins. 15 minutes is often more than enough.



REAL-TIME

Share it whilst it's fresh! Create a culture where instant feedback is encouraged and appreciated.



SUPPORTIVE

Valuable feedback aims to build the person, not break them down. Ensure feedback is given for the right reasons.

Stage 3: Assess

There should be no surprises here!



FACTUAL

If the stage 1 and 2 were done effectively, this should be easy. Ensure all rating or assessment are supported by evidence, even the HOW goals.



PREPARED

When it's time to assess, preparation is key to keep the conversation on track.



MULTI-SOURCE

Feedback should not just be from the manager. Incorporate 360 (or 180), self assessment and other forms of feedback as part of the process.

Stage 4: Reward

It's time to close the loop and address the “so what”



FINANCIAL

Transparency creates clarity. Make it clear how performance is linked to financial reward (increases or bonus).



NON-FINANCIAL

Reward does not always have to be financial. Ensure other forms of reward are appreciated and used in the organization.



GROWTH

High performance should lead to clear personal and professional growth.



2

Supporting your team and managers

Stage 1: Plan in action

1

Visibility

Ensure the company goals are understood and visible before the performance management cycle starts. Encourage leaders to create departmental goals and share with their teams to use in preparing their personal goals.

2

Guidelines

Provide clear guidelines on the expectations of goals to both managers and employees. Consider the amount of goals and split of goals. E.g. two professional goals and one personal development goals. Less is more!

3

Examples

Drafting smart goals takes practice. To make it easier for employees and managers provide them with draft goals they can rewrite or edit to make their own.

Stage 2: Engage in action

1

Change the narrative

Start changing the narrative of performance management being an event based tick box exercise to a continuous feedback conversation driving growth and development. Incorporate the message into key meeting, messages and announcements with leadership sponsorship.

2

Plan on their behalf

At the start, continuous feedback might not come natural and might require you to nudge the business along. Block 15 minutes in all employees calendars for one on one meetings or to provide feedback. Provide managers with performance management templates.

3

Promote instant feedback

Encourage instant feedback in the organization through practical tools such as add feedback on the agenda of meetings and adding feedback cards in meeting rooms.

Stage 3: Assess in action

1

Define your rating scale clearly

To support factual and evidence rating, be sure to provide detailed definitions of your rating scale. Here we can make it more objective. Avoid the generic 1 = Poor performance, 3 - Average and 5 = great job.

2

Use structure to drive the right conversation

Use your tool or form structure to drive the right conversation. Prompt the manager to provide evidence to justify their score and provide the equation to calculate the final score (if not automatic). Provide both the manager and employee with a template to prepare for the conversation.

3

Conduct quality and consistency checks

As HR we need to ensure quality and consistency across the organization. Conduct distribution analysis and spot checks on evidence provided. Look out for central tendency bias!

Stage 4: Reward in action

1

Provide a clear financial reward framework

Define and share a clear financial reward framework before the start of your performance review cycle, so people know what to expect. You can still define the % later once budget and market data is available.

2

Provide non-financial reward options

Provide your managers with a list of non-financial rewards they can use as part of the conversations. Consider time and flexibility, recognition (public and private), employee of the month, parking spot closest to the office.

3

Development follows performance

Make sure talent and development conversations include input from the performance review cycle. Growth opportunity is reward.

Stage 2: Engage in action - Manager checklist

P

- ☐ Have we agreed on 3-5 SMART goals?
- ☐ Do you know how your goals help the company?
- ☐ Are the deadlines clear?

A

- ☐ Do I have specific examples/data for my rating?
- ☐ Have I asked for your self-assessment?
- ☐ Is there anything in this review that will be a surprise? (If yes, stop!)

E

- ☐ Are we meeting bi-weekly?
- ☐ Have I given feedback (positive or constructive) this week?
- ☐ Have I asked what obstacles you are facing?

R

- ☐ Does the reward match the performance level?
- ☐ Have we discussed your career growth/next steps?
- ☐ Is the next cycle's plan ready to go?

How often do you have performance conversations that AREN'T about immediate task deadlines?

- A. Once a week
- B. Once a month
- C. Only during formal mid-year/year-end reviews
- D. Honestly? Only when something goes wrong



Things to watch out for.

1

Recency Bias

Considering only the most recent achievement or lack thereof. Performance management is about the full cycle.

Make notes of all 1 on 1 conversations (emails works as an easy solution) and refer back to all of them. AI is your friend here!

2

Halo or Horn effect

When one positive or negative element / trait / action influences every aspect of the review.

Review each SMART goal independently and consider a peer-review / HR review to sense check the ratings.

3

Big Reveal Approach

Manager's waiting until the formal review meetings to provide feedback - often leaving employees surprised.

Encourage managers employees to record at least one conversation per quarter as feedback on goals.

4

The feedback Sandwich

Providing negative feedback sandwiched between two compliments (or positive feedback)

Structure the meeting to focus on positive and negative feedback, and use the SBI model to provide constructive feedback.



3

Jumping into action

5 things you can start doing today!

1

Don't assume managers know what to do. Run manager enablement sessions.

2

Ensure understanding through communication and visibility of information. Sharing is caring!

3

Provide templates, support and guidance. Don't be afraid to run practice sessions with managers.

4

Lead by example. Encourage the HR team and senior leaders to finish theirs first, start the ripple!

5

Don't wait until the last minute to start the campaign and revert back to tick-box exercise mode.

Leveraging AI in Performance Management

AI prompt to support employees and managers with drafting SMART goals

Prompt version

Requires connection to information hub and knowledge of employee

I am a **[Insert Job Title]** at **[Insert Company Name/Department]**. I need help drafting 3-5 SMART goals for the 2026 performance year.

My core responsibilities include **[Task A, Task B, and Task C]**.

For each goal, please ensure it meets the following criteria:

- **Specific:** Clear and unambiguous.
- **Measurable:** Includes a metric or clear 'definition of done.'
- **Achievable:** Realistic given my current resources.
- **Relevant:** Aligned with our team's objective to **[Insert Team Goal, e.g., increase revenue/improve efficiency]**.
- **Time-bound:** Includes a deadline or milestone frequency.

Drafting Instructions:

1. Start by asking me what my top 3 priorities are for the year.
2. Once I provide them, draft the goals in a table format.
3. After the table, provide a 'Stretch Goal' version for one of them to help me think bigger."

Custom GPT version

Requires connection to information hub and knowledge of employee

Goal-Setting Module

Trigger: Activate this ONLY when the user mentions goals, OKRs, performance planning, or development.

Your Role: Coach, don't prescribe.

Objective: Guide the user to create 4 goals for the year (2 Professional, 2 Personal Development).

Guiding Questions (Use open-ended coaching):

1. "Looking ahead to 2026, what impact do you want to have as a [employee role]?"
2. "What are the biggest challenges or opportunities for the [department] Team in 2026?"
3. "What skills do you personally want to grow?"
4. "Is there past feedback you want to address?"

Framework Rules:

- Help make goals Specific, Clear, Measurable, and Actionable.
- **Do NOT force OKRs** unless the user specifically asks for that framework.
- **Do NOT use the terms** "becoming number 1" or "climbing the mountain" (these are scrapped objectives).



**Any questions?
Ask away!**