

# *Responding to a Disappointing Performance Review*

## **Overview**

When your manager reviews your work and finds it wanting.

- Receiving a disappointing review
- First steps: Take notes and ask for clarification
- Gather information to respond to your review
- Preparing to meet with your manager
- Meeting again with your manager
- Building a better relationship with your manager
- Getting feedback from a mentor, coach, or other professional

It is never easy to receive disappointing feedback about your performance in your annual review. When you were not aware that areas of your work need improvement, this can feel devastating. Ideally there would be no unpleasant surprises in performance reviews. But in hectic work environments where employees often have a number of managers contributing to performance reviews and where performance goals sometimes change frequently during the year, it's quite possible to be caught off guard by a review that contains criticism that you didn't expect.

If you receive a review saying that you haven't fulfilled the responsibilities of your job, your response can help you or hurt you. It takes specific communication skills to react constructively to a disappointing evaluation of your work. These tips can help you avoid responding defensively, and convey your confidence that you can improve your performance.

## **Receiving a disappointing review**

While you may have a chance to preview your performance review privately, it's just as common to read it for the first time at a meeting with your manager. If the review is critical of your work, that meeting can be very stressful. Your response is important, and it may help to focus on turning your performance around.

Start by emphasizing your desire to work with your manager to find solutions. Since she is the person who evaluates your performance -- thereby influencing your career advancement and your salary -- it's important to work together. You might say:

- "I'm disappointed to hear my performance has not met expectations. It's important to me to keep working on this team."
- "I plan to improve my performance."
- "I need to hear your feedback as I did not know there were concerns about my performance."
- "Based on what you are saying I know now I need to improve my skills in this area."

If you are angry or feel tears rising, that may be a good reason to ask if the meeting can be rescheduled. A little time will give you a chance to settle your

emotions and make a professional impression, and it will give you an opportunity to plan your response.

### **First steps: Take notes and ask for clarification**

Your manager may want to explain some of the points in the written review even before you break, and if so, try to listen to his explanation. It is helpful to take notes during the meeting. Ask for clarification of anything you don't understand. Get specific examples of instances when your performance did not meet expectations. Make the effort to keep your response professional and to the point, asking if you could set up an appointment to talk once you've had a chance to read the review and think about it. You might say:

- “There’s a lot to absorb here.”
- “I am disappointed that you have found my performance below your expectations in some areas. I’d like to think about constructive solutions before we talk in detail.”
- “I want to make sure I understand your comments.”
- “May I read this more thoroughly tonight and meet with you later this week?”

Consider sending a follow-up e-mail clarifying what you heard and what you know you need to work on. This will help you plan for the next meeting and ensure that you are both on the same page.

### **Gather information to respond to your review**

Before you meet again with your manager to discuss your performance review, you'll want to gather as much information as possible about your work. Whether you are responding to your manager's review or writing a self-evaluation, you'll need to be very specific about your accomplishments. Here are some tips as you gather information to respond to your review:

- *Be familiar with your organization's performance appraisal system.* Use your company handbook, your manager, or the HR department to answer questions about the company's evaluation system.
- *Go back over your year's work and compare your own evaluation of it with what your manager said in his review.* If possible, look at past years' reviews to assess changes.
- *Pull out any documentation that may provide your manager with a broader perspective,* such as “Thank you” e-mails or notes from clients.
- *Prepare for the conversation.* If you want help thinking through how to talk with your manager constructively, you might read the book *Crucial Conversations: Tools for Talking When Stakes Are High* (McGraw-Hill, 2002) by Kerry Patterson, which provides a practical overview for talking about difficult issues while

limiting defensiveness. Your employee assistance program (EAP) can also provide guidance.

- *Make notes of any questions you'd like to ask your manager at the next meeting.* If your manager hasn't provided specific examples to support general statements, make a note to ask for these.
- *If you strongly disagree with your manager's assessment, make a note of your points of disagreement and supply examples that support your opinion.* If your relationship with your manager allows for a frank discussion, you may want to bring these points up when you meet with her. Your company may have a policy that allows you to append your own comments or a refutation to your review. Make sure that you discuss this with your human resources (HR) representative if you can be assured of confidentiality or with someone at your EAP to find out the pros and cons of doing this.

#### **Preparing to meet with your manager**

If you are committed to improving your performance, you'll need to organize your questions, ideas, and performance information and then meet again with your manager. Even if you think your performance has been excellent, it's important to acknowledge at the meeting that you are open to talking about areas for improvement. Doing this shows your manager that you have a realistic view of your own performance.

- *Before your meeting, plan your comments and questions.* Expect to take the initiative to get specific suggestions from your manager. She may have written in the review that you "need to be more proactive." It may be up to you to find out specifically what skills you need to gain or behaviors you need to demonstrate. Also, if you think that there are current problems with procedures, equipment, or communications that have contributed to the performance gap, note them and try to come up with possible solutions that could help. In all cases, your questions need to be framed as a genuine attempt to understand, not as a defensive challenge. Here are some suggested questions and statements for your conversation with your manager:
  - "When did my performance move below expectations?"
  - "It would really be helpful to me if we could talk about specific examples."
  - "It would be helpful if I could see an example of an outstanding report to better understand where I came up short."
  - "I'd like your guidance on what I can do to improve."
  - "Let me see if I understand what you'd like me to change."
- *Come to the meeting prepared with solutions to issues that are raised in the review.*
- *Be organized.* You'll want to devise a way to track your steps toward meeting your goals. It's a good idea to choose a planner, PDA, or other tools so that you will be

able to track your progress as you achieve milestones on the way to meeting the goals and deadlines you and your manager work out together.

### **Meeting again with your manager**

The most important part of responding effectively to a disappointing performance review is forming a specific plan for change when you meet with your manager. Here are some suggestions:

- *Be in control of your emotions.* You want to make sure you do not sound defensive or accusatory during the meeting. This conversation is about your own performance. It may be tempting to bring up issues you have with your manager, his level of support, or whether he has provided you with the necessary resources to do a good job. However, stick to an evaluation of your own performance, and never raise your voice or show anger.
- *Clarify expectations.* Many negative performance reviews are a result of not communicating effectively about expectations. Managers and staff have both spoken and unspoken expectations and opinions about what it takes to do a good job. Make sure that you clarify your manager's expectations of you. Say, "I want to be sure I know what is expected of me on this project. Could you please review what will be key for a good result here from your point of view?"
- *Get a commitment from your manager to give you feedback.* You will need to ask your manager to give you immediate feedback whenever he feels that your performance is not meeting expectations. You may want to ask if there was any obstacle that prevented him from giving you this feedback that you need to discuss together. For example, are you so sensitive about negative performance feedback that your manager has stopped giving it to you?
- *Make sure your job goals accurately reflect your manager's expectations.* Where a task is quantifiable, ask for specific targets. How many clients should I be calling each week? What calculations would you like to see in my reports? How quick a response are you expecting to your e-mail messages? How many errors are acceptable? Ask your manager to agree to specific performance measures.
- *Discuss time frames and when to check in on your progress.* Agree with your manager on a period of time after which you can check back with him about your improvement. After next month's sales figures, after you've corresponded with the next 10 customers, or after a particular conference -- any of these can serve as a milestone. Define the goals and the measures of success for the time frame you set.
- *Ask for specific suggestions for help in skill development.* Ask your manager if he can suggest courses or other ways that you might develop your skills. Often the best help may be available on your own team. If your manager feels you need to improve your customer service skills, could you shadow a top customer service representative to hear how he or she handle difficult calls? Or, if your manager

feels your writing skills need improvement, perhaps there is someone at work who would be willing to mentor you. Or if you need to work on speaking in front of clients, perhaps there are meetings where you could present material in front of people you feel comfortable with.

### **Building a better relationship with your manager**

Here are suggestions on ways to build a better relationship with your manager:

- *Establish a way to talk regularly about your performance.* You might have informal evaluations twice or four times a year. If this is the case, bring your annual performance goals to the meetings for review and possible updates as necessary. You might also request a debriefing after each project where you can ask questions such as: How did this project work for you? What did you like about my performance? Is there anything I can do differently on the next project? Is there any aspect of my performance that if not corrected could have an impact on my review?
- *Keep a record of your achievements.* Keep a “brag” file with evidence of what goes well for you in this upcoming performance year. Save positive feedback you’ve received, including e-mails from clients, co-workers, or other managers. Send copies of positive feedback you receive from others to your manager throughout the year.
- *Try to get a sense of the big picture.* Ask questions that will help you better understand how your goals fit into the bigger picture of departmental and organizational goals. What are the highest priorities for your department this quarter? How is your department doing compared to others in the company? What would you consider the biggest success your team has had this year? Asking questions like these also reinforces your statements of commitment to the team and organization.

### **Getting feedback from a mentor, coach, or other professional**

Even though you’re mounting a constructive response to your performance feedback, you may at times feel worried, discouraged, or angry about your performance issues and your relationship with your manager. You may still be upset that your manager did not give you feedback early enough to allow you to improve before your review. You may also be considering if this is the right fit for you if you feel, after honest reflection, that your current role is not a good match with your strengths and your interests. You may be asking yourself, “Do I want to stay in this role and work with this manager?”

If that’s the case, it will probably be helpful to talk about your concerns and feelings, but to whom? Co-workers aren’t always the best choice as confidants. It puts them in an awkward position and might even affect their respect for you. Family members, too, are usually supportive but are often too biased and not

knowledgeable enough about your work to offer useful advice. Feedback and coaching could come from mentors, including former managers, inside or outside of the organization, a consultant at your EAP, a trusted confidant, or someone in HR with whom you can request to speak confidentially.

Working through this process may not be easy, but by following these tips you can react professionally and constructively and may even move forward positively in your relationship with your manager.

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