

Sample Performance Assessment Cadence

Introduction

While admittedly mundane, performance assessment is one of the most powerful tools in your Predictable Success toolkit. The right performance program will ensure your best employees stay around, your worst employees move on quickly, and your average employees today develop into your top performers in the months and years ahead.

As mentioned in [this article](#), one of the 5 keys to success in performance assessment is mastering your consistency & frequency. To do so, you should conduct assessments as frequently as you can so long as the following are true:

- You can meet with near-perfect consistency. It is far better to meet consistently once a year than to shoot for 12 assessments and only complete 9.
- You have had enough time to make substantial progress on the goals set in the previous meeting.
- You are fully confident it is the best use of your time and your employee's time.

A sample structure

For many organizations, a performance assessment structure will look like this:

- the annual performance review
- shorter quarterly planning sessions
- monthly informal check-ins
- continuous feedback between sessions

1. Annual Review

Frequency: Annual

Duration: 60-90 minutes

Purpose:

- Discuss long-term career objectives
- Discuss previous year's goals and progress
- Discuss applicable organizational objectives and connect individual goals
- Identify behaviors that are consistent with their goals
- Discuss compensation plan
- Inspire individual improvement

Output:

Annual development plan with 1-3 SMART goals, milestones, and scheduled follow-up dates.

2. Quarterly Planning

Frequency: Quarterly

Duration: 15-45 minutes

Purpose:

- Discuss what went well
- Discuss what can be improved
- Update SMART goals and follow up plan

Output:

Quarterly SMART goals and scheduled follow-up dates.

3. Informal Check-In

Frequency: Monthly

Duration: <10 minutes

Purpose:

- Celebrate successes
- Clear roadblocks

Output:

Action items for both manager and employee

4. Continuous Feedback

Frequency: Daily+

Duration: <5 minutes

Purpose:

- Catch them doing something right
- Gently but consistently remind them of the behaviors that align with their goals
- Provide clarity

Output:

Simple conversation