


Overview of Begin | Mid | End Year – Review

Ongoing Feedback

	When	What	Actions from the employee	Actions from the manager
Begin Year Review	Jan	Define OKRs for Q1 'WHAT' & Behaviors 'HOW' according to the business needs.	Define the first draft of your OKRs for Q1 or for this year.	Overview your employee's suggestion for the OKRs and align them with the team's department's OKRs.
Mid Year Review	June - July	Mid-year check-in on year-to-date progress, adjustment of the OKRs. Define OKRs for Q3.	Fill the self-assessment form prior to the meeting with your manager. Provide an update on your accomplishment's vs your OKRs (Focus on the 'WHAT' & 'HOW').	Before the meeting, review the employee's self assessment. Review progress against OKRs Define OKRs for Q3 accordingly.
Year End Review	Nov - Dec	Performance Review on the employee's performance on WHAT & HOW. Two meetings are taking place: 1st meeting: Feedback session	1st meeting: Prior to the meeting, fill the self-assessment form in bob and discusses with the manager. Define together the OKRs for the next quarter or for the following year *It's optional to set OKRs in this meeting.	1st meeting: Before the meeting, review the employee's self assessment on the performance. During the meeting, discuss and give feedback . Don't communicate rating.
	Feb-Mar	2nd meeting: Communication of decisions on Performance & Merit	2nd meeting: The purpose of the meeting is to communicate managers decision after feedback meeting, calibration & final approval. Therefor, the employee's responsibility lays mainly in the 1st meeting.	2nd meeting: Communicate decision of Performance & Merit.
Ongoing Feedback	Ongoing	OKRs status meeting on a monthly basis. Provide ongoing feedback on the performance on day-to-day actions.	Update your OKRs on a regular basis (Min once a month) Proactively ask for feedback from you manager, your peers and relevant stakeholders.	Review your employees OKRs progress in a monthly check in meeting. Provide ongoing feedback and make sure to follow the "7 golden rules".

Manager Guide

How to Prepare for the Mid |Year End Review?

The feedback meeting is meant to reflect the employee's progress and achievements on both the OKRs and Behavioral Competencies. your preparation for the conversation can increase the probability for a meaningful discussion, both for you and for the employee, increase engagement and motivation.

Below you can find tips for an optimal preparation:



Throughout the year:

- **Encourage and monitor**

The employees OKRs update on a monthly basis in the system. Write your comments in the in the 'check in notes'.

- **Open a designated folder for your employee**

In outlook or your personal drive. Through the year document E-mails, files, data, etc.. That reflects the employees progress on his / her OKRs and Behavioral Competencies.

- **Feedback**

Ask for feedback from your employee main interfaces after achieving a milestone (Major or Small) / Encourage your employee to do the same.



In proximity to the performance conversation:

- **Set a time and a place**

Where you and your employee can discuss without interruptions. Send your employee an invite.

- **In case you haven't managed your employee during the full year**

It's important you will contact (If possible) the employee's former manager to collect the assessment.

- **Review the employee's self assessment**

On their performance (Mandatory to fill before your meeting). Go over the OKRs and the data you have collected. Define the gaps and think of a set of questions you wish to ask in the conversation (*Please find a proposed set of questions in this Guidebook).

- **Try to anticipate**

The course of the conversation and preempt tensions (In accordance with the gaps you have defined).

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Tips for conversation starters



01 Create a **positive tone** and put the employee at ease: acknowledge that the employee may feel uncomfortable, try to reassure, stress the routine of it.

02 Keep it **informal** but business-like.

03 Review the **agenda** and explain structure of the meeting: so the employee will know what to expect.

04 Give the **employee a chance** to raise concerns.

05 Clearly explain the **purpose** and importance of the meeting in positive terms. Say that appraisals are designed to:

06 Help the employee know how he/she is doing.

07 Ensure you are both on the **same track** in terms of realistic goals and priorities.

08 Provide a forum for **problem resolution**.

09 Provide **feedback** to help the employee succeed, are an investment in professional development.

Tips



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Set of questions you can ask
During the Performance conversation

Make sure you ask open questions to encourage a discussion
(*Closed questions deliver Yes/No answers)



01 To what extent did you meet your OKRs for the quarters | year?
(How & What)

02 What do you feel went well this year and what might have gone better?

03 What was your biggest success?

04 What has contributed to your success?

05 To what extent do you feel you have embodied our company values? Be as specific as you can.

06 How well do you prioritize and manage your workload?

07 What are you hoping to accomplish over the next quarter, six months and year?

08 Do you have access to all the tools and resources you need to do your job? If you don't, what do you need?

09 In case you haven't achieved your OKRs, how should you work differently in order to achieve them?

10 What specifically are you going to do next? When are you going to do it? How do you plan to do it?

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How to Deliver Feedback - 7 Golden rules

The way we deliver the feedback can effect on employee's engagement and performance. By following upon the **"7 Golden Rules of feedback"**, you minimize the probability of challenging.

Employee reactions to the feedback

1

Micro Yes Question

Prepare receiver for the feedback

2

Give Examples Provide context

Be clear, use specific examples and don't generalize

3

State Impact

Describe reaction and consequences

4

Respectful & Nonjudgmental

Focus on behavior that can be changed and not personality

5

Give Opportunity to Respond & Listen

Self reflect: "What are your thoughts"? "What do you think?"

6

Ask the employee for suggestions

On how to improve, then make your suggestions, taking the "Feed Forward" approach

7

Express Support

End by encouraging, confidence and focusing on strengths

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When is the appropriate time to give feedback?

We support an ongoing feedback approach where you and your employee have an ongoing dialogue with regards to his goals, successes and areas for improvement.

After a major & minor success

After a minor & major failure

At each milestone of a project

When you are the witness for a behavior that should be promoted and encouraged

Whenever you can give a piece of advice

When asked by the employee

Monthly when updating the OKRs

When you see something is going to go wrong: give feedback before!

Weekly/ Daily one on one

When the employee is not overwhelmed by emotions

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Interested in Additional Materials to Enrich Your Knowledge?

Click on the topic that interests you, and the video clip will start.



How can managers give effective feedback?



The secret to giving great Feedback



How to give constructive feedback?



Why good leaders make you feel safe?