

The line manager's guide to Virtual Appraisals



Plan processes in advance

Let the employee know the necessary steps that need to be completed prior to the virtual review session. Also, it is a good idea to set an agenda that outlines the key discussion topics, which allows expectations between all parties to be properly aligned.



Fix a date and stick to it

Performance reviews are of paramount importance and should be treated as such, even if they are conducted virtually. After confirming on a date and time, stick to it as much as possible and avoid rescheduling. This helps to convey the importance of the session and allows the employee to be mentally prepared for the conversation ahead of time.



Book more time than needed

You would typically have several employees to review during the appraisal season. As such, we encourage each review to be spaced apart with some buffer time in between. If reviews are expected to last for an hour, block out 1.5 hours instead so that conversations can continue without being disrupted due to time constraints.



Videos should be turned on

A performance review is a critical conversation, which means that it is not just another meeting or phone call. As such, it is common courtesy to turn on cameras on both computers, so that the session can be conducted as close to a face-to-face conversation as possible. This also has the added benefit of allowing non-verbal cues like facial expressions and body language to be picked up.



Pay attention

Though the review might stretch on for some time, create a conducive environment that encourages open discussions. Keep your phones away or on mute and, if you're a parent, choose a time when your children are likely going to be taking naps. Always be aware of how you are projecting yourself on screen, so that your employees know that you are engaged and 100% focused on the conversation.



Speak and listen, 50:50

Performance reviews are oftentimes dominated by line managers sharing their thoughts. Instead of taking over the conversation completely, give the employee opportunities to raise concerns or give feedback. Hear what he or she thinks is working well or how your leadership style can be improved. At the end of the day, everybody enjoys dynamic, two-way conversations.



Work on next steps

Just as any other in-person review, clearly outline the next steps: are there specific changes in KPI or goals that need to be made? When will salaries and performance be reviewed again? Clear communications will conclude the review in a productive manner, and give indications on where their efforts should be focused.