



Conducting a **Virtual** Annual Review

Performance conversations between supervisors and employees are essential to supporting both the development of the individual and the overall success of the team...even during a period of Limited Business Operations. Use this as a guide to prepare for Annual Review conversations virtually.

BEFORE THE REVIEW

During a time when supervisors and/or employees may be working remotely, it is important to put in the extra effort necessary for an effective annual review to take place. Here are a few items to consider:

- Identify how the Annual Review will be conducted and by what method (i.e. via a virtual platform or in-person, while respecting social distancing).
- Identify what type of technology will be needed (Zoom, MS Teams, etc.).
- Identify a time that works for both supervisor and employee.
- To minimize technical hiccups, do a video test-run prior to conducting virtual Annual Reviews.
 - Both supervisor and employee should check their internet connectivity, and confirm cameras and microphones are working properly.
 - Make sure both people can hear and see each other and know how to utilize the mute function.
 - If you plan to share your screen, test that feature and make sure you can use it effortlessly by the time of the actual Annual Review.
- As an added precaution, give the employee a backup method to reach you in case there is a glitch or something goes wrong with the technology. Make a plan as to how you will reconnect with your employee should a problem occur.
- If a supervisor or employee has a poor internet connection, make arrangements to meet in the office or from other locations with better internet quality. If you meet in-person, always follow social distancing guidelines.

DURING THE REVIEW

- **Dress professionally.** Ensure good light for the video and a sensible background. Remember, if you are at home conducting a virtual Annual Review, it is different from your normal office setting. Be conscious of what is in your background, ensure that you are well lit, and dress as you would if you were going into the office.
- **Give the employee your undivided attention.** Close your email and turn off or silence your mobile device. When you are sitting at your computer, rather than across the table from someone, there is a much greater risk of becoming distracted. A simple distraction can ruin the flow of a conversation. By closing your email and any other apps where messages pop up, you will help ensure that your focus is where it should be.
- **Remember to smile, make, and sustain eye contact.** It can help to nod when someone is talking to show that you are following and the technology is functioning properly.
- **Inform the employee if you will be taking notes throughout the Annual Review.** The employee needs to know this so that when they see you writing or hear you typing, they know why.
- It is important to remember that working from home often adds distractions in the form of spouses, partners, roommates, children, and pets. It is important that we do our best to mitigate these distractions, but also equally important to exercise a little extra compassion and thoughtfulness when these interruptions do occur.

Keep in mind, it is best to approach a virtual Annual Review with the same preparation and professionalism as you would an in-person Annual Review.