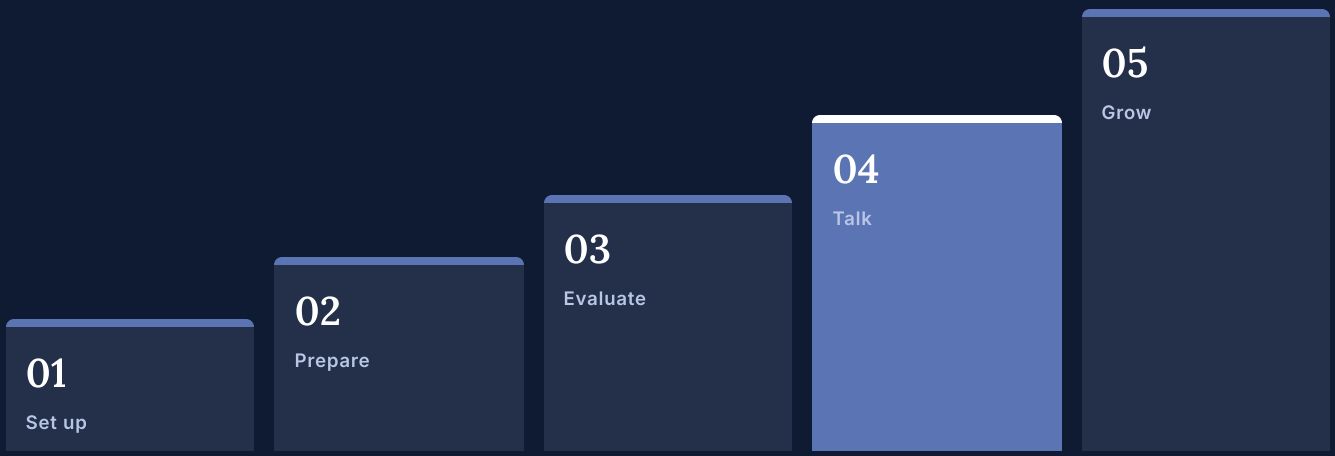
Herrera
HR GROWTH PARTNERS

FOUNDER FIELD GUIDE

PERFORMANCE REVIEWS FOR GROWING TEAMS

Reviews your managers won't dread. *And your people will actually use.*

A practical guide to setting up a review process, writing fair feedback and turning each conversation into a plan for growth.



INSIDE THIS GUIDE

Contents

01 **Set up a process that fits your size** 3
Cadence, what to rate and a simple form

02 **Prepare** 4
Evidence, self-reviews, who does what and a question bank

03 **Evaluate fairly** 6
Goals, behaviors, bias checks and calibration

04 **Write feedback that lands** 8
A simple structure, before-and-after examples and words to avoid

05 **Hold the conversation** 9
An agenda, opening lines and handling tough moments

06 **Turn the review into growth** 11
Development goals and follow-up

07 **Common mistakes** 12
What goes wrong and what to do instead

08 **How I help** 13
Review process support and who I am

A NOTE BEFORE YOU START

In a growing company, most managers are leading people for the first time. Reviews are where that shows.

Your best engineer or top salesperson gets promoted, and suddenly they're expected to evaluate the people they used to sit beside. Nobody showed them how. So reviews get rushed, ratings drift upward, hard feedback gets softened until it disappears, and six months later someone is surprised to learn they're not meeting expectations.

A good review process fixes that. It gives managers a clear structure, gives employees honest direction, and creates a fair, consistent record, which matters more than most founders realize if a performance problem ever ends in a termination.

Peter Herrera

Founder, Herrera HR Growth Partners

SECTION 01

Set up a process that fits your size

You don’t need enterprise software or a 10-page form. You need a predictable rhythm, clear expectations and the same questions for everyone.

Choose a cadence

CADENCE	WORKS WELL WHEN	WATCH OUT FOR
Annual review	Roles are stable and goals don’t change much during the year	Feedback arrives months late; managers rely on memory
Twice a year	Most growing companies: enough structure without too much overhead	Mid-year can turn into a formality if it isn’t taken seriously
Quarterly check-ins plus a yearly review	Priorities shift fast and you want feedback close to the work	Keep quarterly check-ins light: 30 minutes and a few questions

RATE TWO THINGS

- **Results:** progress on the goals set at the start of the period
- **Behaviors:** how the work got done, measured against your values or a short list of competencies

USE A SHORT SCALE WITH DEFINITIONS

- Four or five levels, each with a one-sentence definition
- Make “meets expectations” a genuinely good rating, not a disappointment

A SIMPLE REVIEW FORM

1. Goals for the period and results on each
2. Key strengths, with examples
3. One or two areas to develop, with examples
4. Behaviors and values
5. Overall rating
6. Goals and development plan for the next period
7. Employee comments

> **Separate the pay conversation**
>
> Hold any raise conversation a week or two after the review. When both happen in one meeting, people only hear the number.

Sample rating scale

Exceptional	Results well beyond the role’s expectations, with impact on the wider team or company. Rare.
Exceeds	Consistently beyond expectations in most areas.
Meets	Fully does the job well. Reliable, solid results. Most of your team should be here.
Partly meets	Meets some expectations but has clear gaps that need to close.
Does not meet	Significant gaps. Needs a written improvement plan.

SECTION 02

Prepare

The review should reflect the whole period, not the last three weeks. Give managers at least two weeks to pull it together.

EVIDENCE TO GATHER

- Goals set at the last review, and any changes since
- Notes from one-on-ones and project check-ins
- Metrics tied to the role: sales, quality, customer feedback
- Input from two or three peers or internal clients, for key roles
- Upward feedback from direct reports, if the employee manages people
- Praise and concerns already shared during the period

SELF-REVIEW QUESTIONS

1. What are you most proud of from this period?
2. Which goals did you meet, and which fell short? Why?
3. What got in your way, and what support would help?
4. What skill do you most want to build next?
5. What should your manager start, stop or keep doing?

Ask for self-reviews a week before the manager writes theirs, so the manager can respond to them.

Who does what

STEP	MANAGER	HR OR PEOPLE LEAD
Kickoff	Blocks time on the calendar	Shares the timeline, form and rating guide
Preparation	Gathers evidence and reads the self-review	Trains managers and answers questions
Drafting	Writes the review with specific examples	Spot-checks drafts for tone, consistency and risk
Calibration	Explains ratings and adjusts if needed	Runs the session and tracks rating patterns
Conversation	Holds the meeting and agrees on next steps	Supports difficult conversations
Follow-up	Checks in on development goals	Tracks completion and reports trends

A six-week cycle

Weeks 1–2

Kickoff and manager training. Employees complete self-reviews. Peer input requested.

Weeks 3–4

Managers draft reviews. HR spot-checks drafts. Calibration session.

Weeks 5–6

Review conversations. Development plans agreed. Pay conversations follow, if applicable.

A question bank for every part of the review

Pick a few from each set. Use the same questions for everyone in similar roles, so reviews are consistent and comparable.

SELF-REVIEW

- What are you most proud of since your last review?
- Which goals did you meet, and which fell short? What got in the way?
- What do people on the team rely on you for?
- Which of our values did you show most clearly? Give an example.
- What would help you do your best work more often?

PEER INPUT (FOR KEY ROLES)

- Describe a meaningful contribution [name] made in this period.
- What kind of work does [name] excel at? Give an example.
- How has [name] affected the team or your own work?
- What is one thing [name] could do to be even more effective?

MANAGER TO EMPLOYEE

- How well do you understand what's expected of you?
- Do you have the tools and information you need?
- How have I helped you this period, and how could I help more?
- Do you feel comfortable raising new ideas or concerns with me?
- What training or experience would help you most?

LOOKING AHEAD

- What are your top three priorities for the next six to 12 months?
- What would you like to be doing a year from now?
- What new skill do you most want to build?
- What's one thing we should start, stop or keep doing as a team?

> **Questions to skip**
>
> Anything about age, family plans, health, religion or other personal characteristics, and leading questions like "Don't you think you should have…?" Keep questions about the work and the person's growth.

SECTION 03

Evaluate fairly

Start from the goals you agreed on, then look at how the work got done. Before you finalize anything, check your own judgment for bias.

AGAINST GOALS

- Did they meet, partly meet or miss each goal?
- What evidence shows it?
- Did priorities or resources change along the way?

ON BEHAVIORS

- How did they work with others and handle setbacks?
- Did they show the values you hire for?
- Would you want more people working this way?

Check for common biases

BIAS	WHAT IT LOOKS LIKE	ASK YOURSELF
Recency	The last month outweighs the other five	Does my evidence cover the whole period?
Halo or horns	One strength or weakness colors every rating	Did I rate each area on its own evidence?
Similarity	Favoring people who work or communicate like you	Would I rate this the same if they had a different style?
Leniency	Everyone “meets” or “exceeds” to avoid conflict	Would this rating hold up next to my peers’ teams?
Proximity	People you see in the office get more credit than remote staff	Am I judging output, or visibility?
Attribution	Blaming one person for a team or system problem	What was within their control?

Your reviews are also a record

If a performance problem ever leads to a termination, the review history will be one of the first documents anyone looks at. A “meets expectations” rating on someone you later let go for performance is very hard to explain. Be honest and specific in writing, every cycle.

Calibrate, even with just a few managers

One manager's "exceeds" is another's "meets." Calibration is a short meeting where managers compare ratings and agree on what each level means, before anything is shared with employees.

Before

- Managers submit draft ratings with one or two lines of evidence each
- HR shares the rating spread by team

During (60–90 min)

- Walk through each rating level and compare examples
- Discuss outliers: very high, very low, and anyone near a promotion
- Check patterns across teams, tenure and demographics

After

- Managers adjust ratings and update written feedback
- HR records decisions and the reasons for changes
- Ratings are final before any review meetings

Questions that keep calibration honest

- [ ] What specifically did this person do that puts them at this level and not the one above or below?
- [ ] Is this rating based on results and behaviors, or on how much we like working with them?
- [ ] Would two people doing the same work on different teams get the same rating?
- [ ] Are any groups, such as remote staff, part-time employees, or people who were on leave, rated lower overall? If so, why?
- [ ] Does the written feedback match the rating?

Leave and protected time off

Don't penalize people for time spent on protected leave. Rate their performance during the time they worked, and adjust goals so they reflect their actual time in the role.

Ground rules for the room

- Talk about evidence, not personalities
- Every manager explains their own ratings
- What's said in calibration stays in calibration
- HR or a neutral facilitator keeps time and notes

Avoid forced rankings

Looking at the spread of ratings is useful. Forcing a set percentage of people into each rating usually isn't, especially on small teams, where it can push good performers into low ratings and create risk.

SECTION 04

Write feedback that lands

Useful feedback is specific enough that the employee knows exactly what to keep doing or change. A simple structure helps: **situation, behavior, impact, next step.**

VAGUE	SPECIFIC
"Great job this year."	"During the Q3 system migration, you mapped every client dependency before cutover. We had zero unplanned outages, and two clients called it our smoothest change yet. Next: lead the Q1 migration and coach Sam through it."
"You need to be more detail-oriented."	"Three of the last five proposals went to clients with pricing errors that we had to correct. It cost us credibility with two accounts. Next: use the pricing checklist and have a second person review anything over $25,000."
"You're not a strong communicator."	"In weekly leadership updates, risks often come up for the first time after a deadline has passed. That leaves no time to adjust. Next: add a 'risks' line to every update and flag anything that could slip by more than a week."
"Be more of a leader."	"When the team disagreed about the launch date, you waited for me to decide. Next quarter, I'd like you to run those decisions: gather input, make a recommendation and own the call."

MAKE IT BALANCED

- Lead with real strengths, with examples
- Limit development areas to the one or two that matter most
- Frame gaps as the next skill to build, without softening the message

WORDS AND TOPICS TO AVOID

- Personality labels: "abrasive," "emotional," "not a culture fit"
- Absolutes: "always," "never"
- Comparisons to coworkers
- Anything about age, family, health, religion, pregnancy or leave, including comments like "low energy" or "not as quick as before"

Before you submit, reread it as the employee

- Does every rating have at least one specific example behind it?
- Would they recognize the situations you describe?
- Is it clear what they should keep doing and what should change?
- Would you be comfortable if a judge, or their next manager, read it?

SECTION 05

Hold the conversation

Send the agenda a few days ahead. Meet somewhere private, or on video with cameras on, and give it your full attention.

A 45-MINUTE AGENDA

Open and set the tone	5 min
Employee's view first	10 min
Strengths and results	10 min
Areas to develop	10 min
Goals and development plan	8 min
Recap and next steps	2 min

LINES THAT HELP

"This is a conversation, not a verdict. I want to hear your view as much as share mine."

"Before I share my thoughts, how do you feel this period went?"

"What would have made that easier for you?"

"Let me make sure I understand. You're saying…"

Handling tough moments

IF THE EMPLOYEE…	TRY THIS
Disagrees with a rating	Listen fully, ask for specifics, and share your evidence. If they raise something new, offer to look into it and follow up. Don't change the rating on the spot.
Gets emotional	Pause. Acknowledge it, offer a break, and let them decide whether to continue or reschedule.
Goes quiet	Ask open questions and give them time. Offer a follow-up conversation once they've had time to think.
Raises a complaint	Take it seriously and don't debate it. Tell HR promptly. A complaint of discrimination, harassment or a pay or safety issue is protected, and the review must not change because of it.

REMOTE REVIEWS

- Video, not phone, with both cameras on
- Share the written review shortly before or after the call, not as a surprise during it
- Check in more often: it's harder to read reactions on screen

AFTER THE MEETING

Send a short recap within a day, and let the employee add comments to the record.

"Thanks for today. To recap: we agreed on three goals for next quarter and a check-in on May 15. Let me know if I missed anything."

When performance isn't where it needs to be

The hardest reviews are the ones that matter most. Being kind here means being clear.

DO

- Say it plainly early in the conversation: "Your performance is below what the role requires."
- Use facts and numbers: "The target was 40 accounts; you closed 18."
- Ask what's getting in the way, and listen for things you can fix
- Agree on specific expectations, support and a timeline
- Follow up in writing the same day

DON'T

- Hide the message between compliments
- Guess at personal causes, or bring up health or family
- Promise outcomes you can't guarantee
- Surprise them: they should already have heard this during the period
- Wait for the next cycle to follow up

The no-surprises rule

Nothing in a review should be the first time an employee hears it. If it is, the problem is the feedback during the period, not the review. Fix that with regular one-on-ones.

When to move to a performance improvement plan

If clear feedback and support haven't worked, a written performance improvement plan (PIP) sets out what needs to change and by when. A fair PIP includes:

- [ ] Two to four specific, measurable expectations tied to the job
- [ ] The support the company will provide: training, coaching, tools
- [ ] A realistic timeline, usually 30 to 90 days, with weekly or biweekly check-ins
- [ ] What happens if expectations are met, and if they aren't
- [ ] A review by HR before it's delivered, so it's consistent with how others have been treated

A PIP should be a genuine chance to improve, not paperwork for a decision you've already made.

> ### Involve HR early
>
> Before a PIP, check that expectations were clear, feedback was documented and nothing protected is in play, such as recent leave, an accommodation request or a complaint. If the plan may end in a termination, that review matters.

SECTION 06

Turn the review into growth

A review tells someone where they stand. A development plan tells them where they can go next. Leave every review with both.

SET ONE TO THREE DEVELOPMENT GOALS

- Ask the employee to draft them first
- Make each specific, measurable and tied to the role or the company's plans
- Agree on how you'll both know it's working

Instead of "improve presentation skills," try: "Present the monthly results to the leadership team in March and May, and get feedback from two attendees each time."

SUPPORT BEYOND TRAINING

- **Stretch work:** a project, a client or a decision they'll own
- **A mentor:** someone who's strong in the skill they're building
- **Learning:** a course, a conference or a book, with a plan to apply it
- **Exposure:** time with leadership, customers or other teams

Follow up, or it won't happen

Within 30 days

- Confirm the plan in writing
- Remove early obstacles

Every month or quarter

- Review progress in one-on-ones
- Adjust goals as priorities change

Next review

- Start with the development goals
- Recognize the growth you've seen

A one-line development plan template

"By **[date]**, I will **[skill or result]**, shown by **[evidence]**, with support from **[person or resource]**. We'll check in on **[dates]**."

Questions for a career conversation

- What part of your work gives you the most energy?
- Where would you like to be in two years?
- What skill would make the biggest difference to you?
- What kind of work would you like more of, or less of?
- Who here do you learn the most from?
- What can I do to support you better?

SECTION 07

Common mistakes

Even experienced managers fall into these. Most are easy to fix once you see them.

MISTAKE	WHY IT HURTS	DO THIS INSTEAD
Inflating ratings	Strong performers feel unrecognized, and weak performance goes on record as fine	Use the rating definitions, and calibrate
Saving it all for review time	Surprises damage trust and leave no time to improve	Give feedback in regular one-on-ones
Writing from memory	Recency bias, and vague examples	Keep brief notes throughout the period
Too many development areas	People can’t focus on eight things at once	Pick the one or two that matter most
Talking more than listening	The employee disengages and you miss context	Ask for their view first
Mixing in the raise	The number drowns out the feedback	Hold the pay conversation separately
Rating personality, not performance	Feels personal, and can read as biased	Describe behaviors and their impact
No follow-up	Development plans are forgotten by the next week	Put check-ins on the calendar before you leave the meeting
Treating every team differently	Unfair outcomes, and a weak record if decisions are challenged	Use one process, one form and one rating guide

A quick health check for your review process

Did every employee get a review last cycle? Do ratings vary across managers more than performance would explain? Can employees name their goals for this period? Have managers been trained? Would a review on file support a termination, if one were needed? If any answer is no, that’s the place to start.

SECTION 08

How I help

As your fractional HR partner on a monthly retainer, I set up your review process, train your managers and run every cycle alongside you.

- Design a review process, form and rating guide that fit your size
- Train managers on writing feedback and holding the conversation
- Review drafts for clarity, consistency and risk
- Facilitate calibration sessions
- Coach managers through difficult reviews and PIPs
- Connect reviews to pay, promotion and development decisions

20+ years of HR leadership	**4 industries** financial services, healthcare, hospitality and tech	**2 companies** where I built HR from scratch	**1 to 250** employees: the companies I serve



ABOUT PETER HERRERA

I've spent more than 20 years leading HR in financial services, healthcare, hospitality and tech. I was the first HR leader at a five-venue hospitality group, and later built the HR function at a tech company.

I started Herrera HR Growth Partners to give founders senior HR partnership without a full-time hire, including the manager coaching that makes reviews work. I'm based in Chicago and work with growing companies across the U.S.

The first two months of a retainer

Weeks 1–2

- Review your current process and roles
- Design the form, scale and timeline

Weeks 3–4

- Train managers
- Launch self-reviews and peer input

Weeks 5–8

- Review drafts and run calibration
- Support conversations and development plans

YOUR NEXT STEP

Review season coming up? *Get your managers ready.*

Bring your current review form, or tell me you don't have one. We'll talk through what would work for your team.

FREE 20-MINUTE INTRO CALL

What you'll leave with

- A cadence and format that fit your size and pace
- The two or three changes that would most improve your next cycle
- How a monthly retainer would work for a company your size

No pitch deck, no obligation. If you don't need me, I'll tell you.

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