# Performance Reviews

*Q1 2025*

# Purpose of the Review

*This biannual review is designed to:*

- Celebrate employee accomplishments

- Provide clear, constructive feedback

- Align on goals and expectations

- Reinforce our five Winning Behaviors:
  Passion, Curiosity, Innovation, Care, and Accountability

*\*Promotes fairness, consistency, and transparency—key parts of our culture at WhiteWater.*

# 4 Step Review Process

## How the full process flows:

### 1
**Employee Self-Evaluation**

*Due June 25

Team Members reflect on their performance, rate their goals and Winning Behaviors with comments.

### 2
**Manager Feedback**

*Due July 9

After the self-eval is submitted, you'll complete the review of the team member: rate goals, evaluate the 5 winning behaviors using the 1–5 scale, and provide clear comments and examples.

### 3
**HR Review & Approval**

*Due July 16

HR will review all submissions for consistency. You may be asked to clarify or revise feedback.

### 4
**In-Person 1:1 Meeting & Acknowledgment**

*Due Aug 1

You will sit down with each employee to discuss their performance, hear their perspective, and deliver your feedback. Reviews are released and acknowledged during this meeting. Begin discussing SMART goals for next period.

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# How to Access Your Team's Reviews

**Accessing the Performance Dashboard and Providing Manager Feedback:** Log in to your ADP homepage, then follow these steps:

1. Go to **My Team > Talent > Performance Dashboard**

> **Talent**
>
> Performance Dashboard
>
> Performance Goals
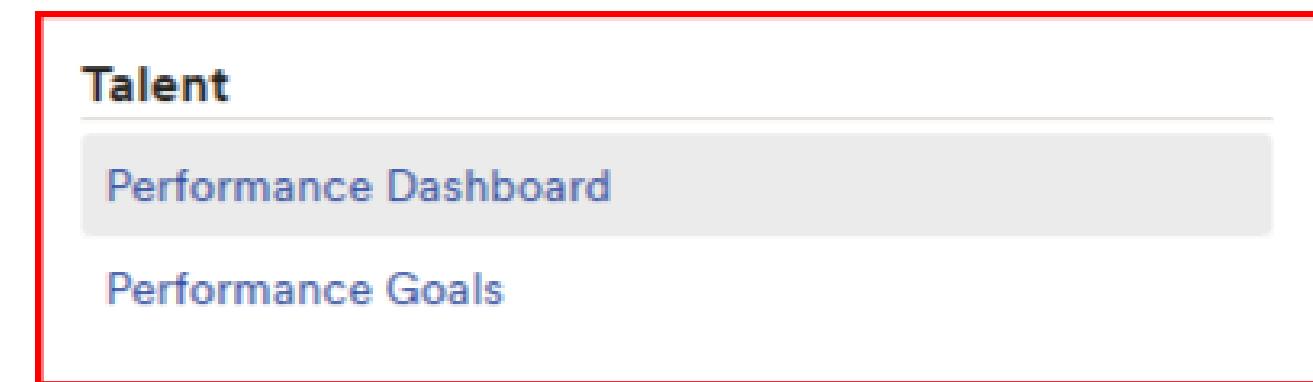
2. You'll see a list of your direct reports to review and complete the assessment. Click on **Provide Feedback** to complete the assessment for each individual.
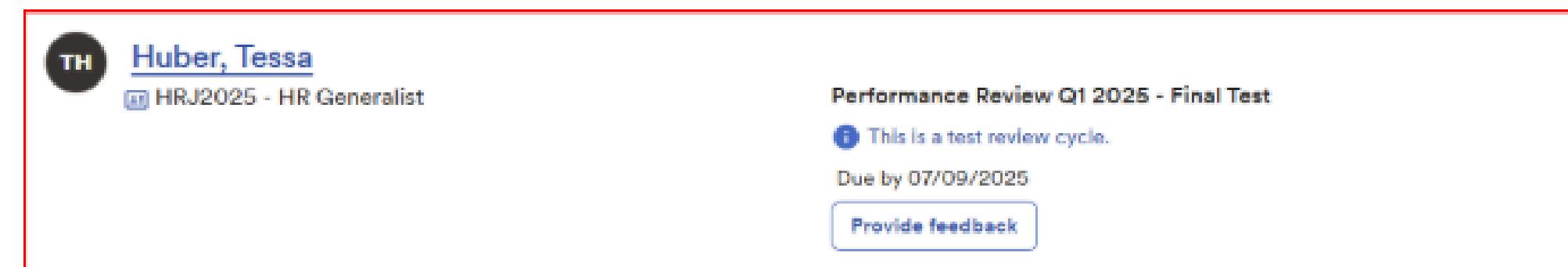
> **TH** **Huber, Tessa**
> HRJ2025 - HR Generalist
>
> **Performance Review Q1 2025 - Final Test**
> ℹ This is a test review cycle.
> Due by 07/09/2025
> [ Provide feedback ]

# Intro Page

**View as Reviewer** | **View as Employee**

Use above tabs to switch appraisal form view

**Doe, John** 🪪

**Review Status: Draft**

Customer Service Representative   View job description

**Reviewer Assessment**
Form Not Distributed

**Employee Assessment**
Form Not Distributed

Evaluation Period
12/01/2024 - 05/31/2025

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| | |
|---|---|
| ℹ **Introduction** | |
| ℹ Rating Scale | |
| ○ Goals (25%) ▸ | |
| ○ Competencies (75%) ▸ | |
| ○ Overall Comments | |
| ○ Summary | |

Review Name
## Performance Review Q1 2025 - Ops

Welcome to the Q1 2025 Performance Evaluation process for WhiteWater Express, covering the period from December 2024 to May 2025.

This review is your opportunity to provide meaningful, specific feedback that supports each team member's development and growth. As a manager, your input helps reinforce what great performance looks like —and helps us grow future leaders.

Each evaluation includes:

- **Goals (25%)**: Review progress toward individual goals set for this period.

- **Winning Behaviors (75%)**: Assess how each employee demonstrates our core values—**Passion, Curiosity, Innovation, Care, and Accountability**.

Use the 1–5 rating scale and refer to the updated descriptions and examples provided to guide your ratings. Focus on observed behaviors and outcomes, and include comments that show *why* you chose each rating.

If you're unsure how to apply the Winning Behaviors or rating scale, reach out to your supervisor or HR partner for support.

Let's make this a valuable process for your team—and a moment to recognize what's working and where we can grow.

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# Rating Scale

Doe, John 👤

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- ℹ Introduction
- ℹ **Rating Scale**
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**Rating Scale**

5 Point NEW

| Points | Rating name and Description |
|---|---|
| 1 | **Unsatisfactory** |
| | Performance is below expectations in key areas and requires immediate improvement. Frequently fails to meet role requirements or behavior standards. Lacks initiative, accountability, or ability to perform independently. May negatively impact team morale or customer experience. Avoids feedback or fails to act on development guidance. Requires close supervision or redirection to meet even basic expectations. Example: Repeatedly fails to complete shift responsibilities, resulting in guest complaints and team frustration. |
| 2 | **Inconsistent** |
| | Meets some expectations, but performance or behavior lacks consistency or reliability. Demonstrates capability but does not consistently follow through or meet expectations. May require reminders, redirection, or additional oversight. Occasional successes are offset by lapses in quality, accountability, or teamwork. Behavior or performance may vary depending on mood, supervision, or environment. Needs support or development to achieve consistent success. Example: Meets sales goals some weeks but misses others due to lack of planning or follow-through. |
| 3 | **Meets Expectations** |
| | Dependable, consistent performance that meets all core expectations of the role. Performs duties fully and reliably; a solid contributor to the team. Achieves assigned goals and maintains consistent quality and service levels. Demonstrates company values and winning behaviors regularly, but not above standard. Willing to help others when asked; works well with teammates. May show occasional flashes of higher-level performance but not sustained. Example: Follows procedures, completes tasks on time, helps train a new teammate when needed. |
| 4 | **Exceeds Expectations** |
| | Frequently performs above expectations. Adds strong value to the team and demonstrates initiative. Takes ownership beyond core responsibilities. Looks for and implements improvements that have a measurable impact. Shows leadership behaviors even if not in a formal leadership role. Regularly exceeds goals or completes work at a higher standard than expected. Proactively supports others and elevates team performance. Example: Identified a gap in the guest experience process and independently created a checklist that improved satisfaction scores. |
| 5 | **Outstanding** |
| | Consistently exceptional performance that significantly exceeds expectations. A role model for others. Demonstrates an extraordinary level of initiative, creativity, and ownership. Consistently finds ways to improve processes, culture, or results beyond their own role. Anticipates problems and solves them independently before they escalate. Recognized by peers and leaders as someone who "raises the bar." Inspires, coaches, or mentors others; performance has a positive ripple effect across teams. Behaviors and results at this level are not occasional—they're consistent and sustained. Example: Developed a new team engagement game that improved sales and was adopted by other stores. |

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# Rater Bias & Common Errors in Performance Reviews

| Error | Description |
|---|---|
| Halo Effect | Overrating an employee based on one strong trait (e.g., "They're great with customers, so everything else must be fine.") |
| Horn Effect | Underrating based on one issue or weakness (e.g., "They messed up that one project, so everything else must be bad too.") |
| Central Tendency | Giving all employees "middle of the road" scores to avoid difficult conversations or comparisons. |
| Leniency | Rating everyone higher than deserved to keep the peace or avoid conflict. |
| Recency Effect | Letting recent events (positive or negative) outweigh the full 6-month performance period. |
| Similarity Bias ("Like Me") | Giving favorable ratings to people who share your interests, background, or values. |

## Tips to Minimize Bias and Rate Fairly

- Evaluate the full review period, not just the last few weeks.
- Keep notes and observations throughout the cycle, not just at review time.
- Ask for feedback from other leaders who have worked with the employee.
- Participate in calibration sessions with peers to ensure scoring consistency.
- When in doubt, talk to HR—we're here to help.

# Step 1: Evaluating Goals (25%)



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- Introduction
- Rating Scale
- Goals (25%)
  - Instructions
  - Goal 1
- Competencies (75%)
- Overall Comments
- Summary

**Instructions for Goals**

For each goal listed below, please:

1. Update the progress percentage based on what the employee accomplished.

2. Evaluate the outcome: Did the employee meet, exceed, or fall short of the goal?

3. Provide comments that explain how the goal was approached and executed—focus on results, effort, and impact. Also, note any challenges (internal or external) that may have affected completion.

Your feedback should go beyond just "yes/no." Highlight what worked, where growth occurred, and where there may be opportunities to improve. This helps reinforce accountability and supports the employee's development moving forward.

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- **Comment on the outcome of each goal**
  - Did the employee meet, exceed, or fall short of the goal? How do you know?
- **Explain the "how"**
  - What behaviors, strategies, or decisions helped or hindered goal achievement?
- **Acknowledge obstacles**
  - Were there any external or internal challenges beyond the employee's control?

Your comments should go beyond "Met goal" or "Did a good job." Be specific.

# Step 1: Evaluating Goals (25%)
## Examples of Goal Comments

✅ **Strong Example (Met Goal):**
"Jamie exceeded their goal of 15 unlimited plan conversions/month by averaging 20. She trained new team members on selling techniques and led weekly contests to motivate the crew. Her initiative created consistent energy around upselling."

⚠️ **Weak Example (Too Vague):**
"Jamie did a good job with unlimited sales."

✅ **Strong Example (Partially Met Goal):**
"Alex completed 70% of the training sessions planned this period. While he had strong attendance and engagement early on, staffing issues in March and April delayed completion. He's on track to finish by July and has already applied some of the content."

| Rating | Description |
|---|---|
| 5 – Outstanding | Goal fully exceeded with major positive impact |
| 4 – Exceeds Expectations | Goal met with additional value delivered |
| 3 – Meets Expectations | Goal met as assigned |
| 2 – Inconsistent | Goal partially met or results varied |
| 1 – Needs Improvement | Goal not met, little ownership shown |

# Step 2: Evaluating Winning Behaviors (75%)

**Instructions for Competencies**

In this section, you will assess the employee's performance across our five Winning Behaviors: Passion, Curiosity, Innovation, Care, and Accountability.

For each behavior, assign a rating on the 1–5 scale (1 = Needs Improvement, 5 = Outstanding) and provide a clear, specific comment explaining why you chose that rating. This section accounts for 75% of the overall evaluation and should reflect both observed behaviors and the employee's overall impact on the team and business.

What to Include in Each Comment:

Observed behavior: What did the employee actually do? Reference specific actions, decisions, or patterns.

Context: When or where did this occur? Tie it to real work situations or time periods.

Impact: How did this behavior affect the team, guests, operations, or business results?

Growth: Have they shown progress over time? Are they developing in this area?

What to Consider When Scoring:

Does the employee consistently demonstrate this behavior, or is it occasional?

Are they influencing others in a positive way through this behavior?

Do they go beyond expectations in a way that improves outcomes?

Have they taken feedback in this area and applied it?

What to Avoid:

Vague or generic comments like "great job" or "needs improvement."

Focusing only on attitude without describing behavior.

Making assumptions without giving specific examples.

📝 Example Format for Writing Comments
Rating: 4 – Exceeds Expectations
"Alex consistently shows strong Passion for our business. He brings high energy to daily team huddles, celebrates wins, and motivates others with a clear focus on KPIs. He took initiative this quarter by launching a game that boosted unlimited plan conversions. While there's still room to involve newer team members more, Alex's enthusiasm and drive clearly go beyond expectations."

You can follow this structure for each behavior to ensure your comments are thorough and helpful.

**Navigation panel:**
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- Rating Scale
- Goals (25%)
- Competencies (75%)
  - Instructions
  - Competency 1
- Overall Comments
- Summary

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- **The 5 Winning Behaviors:**
  - Passion – Brings energy, urgency, and pride to the work.
  - Curiosity – Asks questions, seeks feedback, and looks to grow.
  - Innovation – Brings ideas, solves problems, and improves processes.
  - Care – Supports others, builds trust, and shows respect.
  - Accountability – Takes ownership, follows through, and models integrity.
*Each one gets a 1–5 rating with a required comment. We'll walk through how to score each one accurately.

# Rating Passion

**Shows genuine enthusiasm, urgency, and commitment to personal/team success. Pushes for strong performance and motivates others.**

## What to Look For:

**Leads team huddles with energy**

**Finds ways to improve KPIs**

**Brings a positive tone even under pressure**

**Owns the success of their site/team**

## Rating Guide:

**5
Outstanding** — Inspires others, builds momentum, shares successful practices company-wide

**3
Meets Expectations** — Shows consistent energy, urgency, and commitment to goals

**1
Needs Improvement** — Lacks engagement or urgency

**Sample Level 4 Comment:**
"Brenda consistently brings energy to to work. She drives her team to hit KPIs, introduced a weekly game to improve plan sales, and shares success stories with other GMs."

# Rating Curiosity

Seeks to learn, improve, and grow. Welcomes feedback, questions the status quo, and explores new approaches.

## What to Look For:

Asks for feedback and applies it

Notices areas for improvement and asks "why" or "how"

Volunteers for cross-training or stretch assignments

Learns from others and helps share new knowledge

## Rating Guide:

**5 Outstanding**
Proactively drives learning, mentors others, and brings new thinking into the business

**3 Meets Expectations**
Asks questions, reflects on feedback, tries new approaches when suggested

**1 Needs Improvement**
Resistant to learning, avoids feedback, or shows little curiosity

**Sample Level 3 Comment:**
"Carlos asks thoughtful questions during training and has started seeking feedback after guest interactions. He's shown improvement by adjusting his approach to upselling after coaching."

# Rating Innovation

Thinks creatively and acts resourcefully. Suggests improvements, adapts to challenges, and drives better outcomes through ideas.

## What to Look For:

- Improves a process or tool without being asked
- Pilots something new and tracks the results
- Tries a new method or shares an idea with others
- Suggests creative solutions to meet goals

## Rating Guide:

**5 Outstanding** — Regularly drives innovation, shares scalable ideas, and leads change across teams

**3 Meets Expectations** — Open to new ideas, tests improvements, and adapts well

**1 Needs Improvement** — Avoids change or relies only on established methods

**Sample Level 5 Comment:**
"Ashley created a points-based upsell game that boosted team performance by 15%—it's now being used by 3 other stores. She consistently brings creative, fun, results-driven ideas."

# Rating Care

Demonstrates respect, kindness, and concern for others. Builds a supportive, inclusive environment. Thinks beyond self.

## What to Look For:

- Leads by example with professionalism and empathy
- Listens to ideas and gives credit
- Checks in on teammates, helps with development
- Ensures guests and staff feel respected

## Rating Guide:

**5 Outstanding** — Proactively mentors, lifts others up, and builds a caring culture

**3 Meets Expectations** — Shows respect, helps others when asked, contributes to team harmony

**1 Needs Improvement** — Dismissive, self-focused, or fails to support team cohesion

### Sample Level 4 Comment:

"Marcus regularly recognizes team contributions in group chat and helps newer employees feel included. He also recently coached a peer through a challenging guest interaction with empathy."

# Rating Accountability

Owns actions and results. Holds self and others to high standards. Does the right thing, especially when it's hard.

## What to Look For:

**Tracks and shares performance results**

**Solves problems instead of blaming**

**Accepts feedback without excuses**

**Coaches others and speaks up when something's off**

## Rating Guide:

**5 Outstanding**
Sets the standard for integrity and ownership; drives team accountability

**3 Meets Expectations**
Owns tasks, follows through, and addresses issues when prompted

**1 Needs Improvement**
Blames others, avoids responsibility, or hides mistakes

**Sample Level 2 Comment:**
"Nick shows potential but struggles with follow-through. He missed two weekly goal reviews and has yet to take ownership for missed KPIs without prompting."

# Final Tips for Rating Winning Behaviors

**DO**

- Use specific examples of observed behavior

- Highlight consistency and impact

- Separate attitude from actions

- Keep it developmental —even for high performers

**DON'T**

- Use vague language ("great job," "needs improvement")

- Rate based on one incident

- Avoid difficult conversations— feedback is a gift

**Pro Tip!**

**Use this format for every comment:**

**What did they do?**
**How often?**
**What impact did it have?**

# 1:1 Performance Meeting



The performance conversation is where feedback comes to life. It's your chance to:

- Recognize contributions
- Build trust through transparency
- Clarify expectations
- Encourage growth and development
- Set the tone for the next 6 months

*Even the best-written review can fall flat if not delivered well in person.

# Preparing for the Meeting

*Before the meeting, managers should:*

**Read the employee's self-evaluation fully**

Look for alignment or disconnects between self-ratings and your feedback

**Finalize all manager ratings and comments**

Be ready to explain each rating with an example

**Know your key messages**

What's the biggest win to celebrate? What's one clear area to grow?

**Schedule time intentionally**

Block 30–60 minutes, in a quiet, distraction-free space

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# What Great Managers Do in the Meeting

**Phrases to Use:**

1. "Let me walk you through why I gave that rating."
2. "I saw real growth in how you handled [example]—that's why you scored higher in Accountability."
3. "Here's where I think you have more potential to shine."
4. "What's something you're proud of that maybe I didn't see?"
5. "What do you need from me to help you grow?"

**Celebrate Specifically**

**Balance praise with accountability**

**Coach, don't just judge**

**Pause and listen**

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# Leading Difficult Conversations

**Why difficult conversations matter:**

- Addressing issues directly promotes growth and accountability
- Avoiding problems leads to resentment, disengagement, and underperformance
- Timely feedback prevents small issues from becoming big ones

## Approach with Compassion

- Prepare specific examples and facts
- Focus on behavior, not personality
- Show empathy — listen actively and acknowledge feelings

## Best Practices

- Choose a private, distraction-free setting
- Stay calm, clear, and objective
- Use "I" statements
- Collaborate on next steps and solutions

## Respect & Communication

- Respectful honesty builds trust.
- When handled well, tough conversations make teams stronger.

# After the Meeting

*Managers should treat the review meeting as the starting point for growth in the next 6 months—not the finish line.*

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**Release the review in ADP**

during or immediately after the conversation

**Ask the employee to acknowledge it by August 1**

**Capture any follow-up actions**

development goals, training, check-ins. Create goals for next period.

# Thank You

## For Your Attention



## Questions?