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# 5 Keys to Crafting Relevant Performance Reviews

Proper reviews are more than just a once-a-year check-in. Use these tips to make them more meaningful for your employees.



**DREW AMOROSO**  
Founder, DueCourse

Well-crafted performance reviews can be one of the most valuable tools to help drive progress and development within a law firm. Reviews are more than an opportunity to document performance and provide relevant feedback — they're also a key vehicle to help confirm expectations, engage and motivate your team members in the development process, and to work together to outline their path forward at the firm.

Valuable reviews are informed by a number of key factors and are the result of a fluid yet intentional process that involves much more than a mechanical, once-a-year check-in. Here are a few things to consider as you prepare for and train your team on the review process.

## 1. START WITH THE END IN MIND

The contents of a performance review should align with the direction you want the reviewee to be headed and should outline a path for them to get there. "Aim to craft performance reviews with the end goal in mind," says Jessica Sisco, Senior Manager of

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Legal Recruiting at Reed Smith LLP. "In addition to serving as documentation of your team member's professional standing and growth over time, reviews are meant to provide enough specific information to inform their roadmap for progress within your organization and enough encouragement and motivation via deserved accolades to follow that map."

Reviews that are crafted with the end goal in mind will tighten the feedback and keep it closely related to the growth pattern you've outlined for your team member.

## 2. TIE THE REVIEW TO WELL-DEFINED EXPECTATIONS

We can't expect team members to perform at a high level if what's expected of them is not clear and communicated consistently — so reviews should match the expectations that have already been set out in advance. The content of a relevant review will contain expectations from key documents like the employee's job description, internal development outlines and prior reviews.

"It's always helpful to review a team member's job description or firm competency expectations while drafting a review and to focus on providing concrete examples," says Sisco. "Crafting a review in response to outlined responsibilities and competencies can keep feedback consistent, relevant and assist with limiting subjectivity."

Importantly, these expectations are not something that should be discussed just once a year. Reviews are much more effective and relevant to employees when the expectations are reiterated and reinforced throughout the review period.

## 3. FRAME THE REVIEW WITH REALISTIC EXPECTATIONS IN MIND

Ensure that your expectations of a reviewee's performance are in line with their outlined job description and realistic capabilities.

"We encourage our feedback providers to frame their reviews realistically — which often means making an intentional effort to think about performance metrics at

the associate or staff member's seniority and experience level," says Sisco.

While it's easy to hold our teammates to high standards — which can certainly serve as motivation for them to stretch their skills — the review process is the time to spotlight above-and-beyond strengths and not penalize for consistently at-level performance.

## 4. PREPARE FOR YOUR TEAM MEMBER'S REVIEW ALL YEAR LONG

Relevant performance reviews must reflect the employee performance during the entire review period — not just the recent past. One way to capture a true picture of your team's performance is to create a central location where you can save praise, feedback and specific examples that will help inform the review process.

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Sisco suggests that reviewers set up a yearlong process in which you're saving emails — or crafting notes to yourself — that reference both opportunities for improvement and jobs done well for each of your reviewees. "This helps inform a true yearlong snapshot of performance — not just the past few weeks that are fresh in your memory," she says.

In addition to doing this yourself, also encourage your reviewees to establish their own folder where they can capture successes, areas for improvement or examples of where they instituted prior feedback that led to progress. This exercise offers value on many levels. Along with capturing specific examples that can be discussed in the performance review, your reviewee's ability to see the progress they have made can be a powerful confidence builder. It is easy to spend most of our time thinking about areas for improvement — but a key aspect of development is the ability to draw

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## 5. REVIEWS ARE A SUMMARY OF PAST DISCUSSIONS — NOT A TIME FOR SURPRISES

Effective reviews should be the formal version of the series of informal opportunities for feedback and praise that have taken place since the last time you reviewed the team member's performance. In other words, "the review should never include any constructive critiques that you haven't already spoken with your team member about," says Sisco.

Waiting until the review to discuss critical feedback can be a pitfall for a number of reasons. First, it may lead to the reviewee feeling confused, caught off guard or feeling ambushed by the feedback — particularly if there have been opportunities to bring it up and discuss it openly prior to the review.

Second, giving the team member time to reflect on the feedback and consider it prior to the review will allow them to come to the table ready to have a much clearer and valuable discussion. Third, the closer in time that feedback is given to the behavior or issue in question, the more effective it will be — so saving a list of issues

to discuss for a review that may take place weeks or even months later is an ineffective way to promote progress.

Instead, take advantage of small opportunities to share feedback on the spot and to address issues as close in time to when they take place. This allows team members to make the kind of incremental, well-informed progress that should be taking place in between review periods. If your organization gives formal reviews on a yearly basis, consider instituting quarterly or more frequent informal discussions to facilitate these important conversations. ■

### ABOUT THE AUTHOR

**Drew Amoroso** is the Founder of the legal tech start-up DueCourse, a professional development platform that helps lawyers achieve their performance and productivity goals and develop practical skills through customized video courses and other technology-based learning methods. Prior to founding DueCourse, Amoroso was a Senior Associate at Reed Smith and was the owner of his own law firm where he practiced fitness law — representing innovators in the fitness and health and wellness industries.

 [drew@ducourseapp.com](mailto:drew@ducourseapp.com)

 [www.ducourseapp.com](http://www.ducourseapp.com)

## Revamping Your Firm's Performance Appraisal Process

Organizations are dramatically revamping the appraisal processes to better adhere to the workforce in 2019. Whether the employee is doing a great job or needs significant improvement, it is critical that law firm managers know how to document appropriately the employee's performance and realize the importance of carefully drafting the appraisal. If you're in charge of your firm's review process, you can't miss this session! Join one of ALA's most popular sessions speakers, Michael S. Cohen, JD, in Grapevine, Texas, at ALA's 2019 Annual Conference & Expo. He'll detail the ins and outs of modernizing your employee review process. Register today at [alanet.org/conf19](http://alanet.org/conf19).

