

Making the Most of an Annual Performance Review

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One of the most important days of the year for your team members should be when you sit down with them for their annual performance review. Planned and conducted properly, this one-to-one meeting between the staff member and either you—or, if you have a large staff, the immediate supervisor—can yield many benefits for everyone.

To ensure that reviews at your practice are meaningful and have positive impact, follow these guidelines:

- **Write an agenda and share it in advance.** Team members will be better prepared and less nervous if they know what to expect. Also, discuss the purpose and nature of performance reviews at a staff meeting to make sure everyone's on the same page.
- **Rely on up-to-date job descriptions.** To go beyond generalizations about performance over the past year, reference your comments to the expectations spelled out in job descriptions. These should be detailed—including specific responsibilities and numerical performance targets—and updated if necessary.
- **Take a positive, constructive approach.** Even when performance has fallen short of expectations, focus on finding solutions. Ask for the staff members' point of view and suggestions about how to correct the problem.
- **There should be more to a performance review than reviewing the team members' performance.** The discussion should cover three main subject areas. In addition to an evaluation of the individuals' work, there should also be feedback from team members about practice operations, as well as a career development segment. Talking about training opportunities and employees' aspirations will keep the review from turning out to be one-sided.
- **Consider meeting out of the office, perhaps for morning coffee or lunch.** You want everyone to look forward to performance reviews, so try to make it a pleasant occasion rather than a rushed meeting squeezed into openings in your schedule.

No team-building tool can match annual performance reviews for motivating staff members, making them feel more connected to you and the practice, and helping them advance their careers.

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