

Blockbuster Reviews

Help every employee deliver a five-star performance

By Cathy Cassata

Giving staff evaluations can be stressful, especially when they happen only once a year.

"A practice manager sits down in November and tries to remember what happened in February," says Julianne Prizant, president and founder of the human resources consulting company OptiPeople Resources. Inevitably, she observes, this leads to the evaluation being influenced only by the last several weeks. "The employee can walk away feeling like an entire year of work was reduced to whatever was freshest in their manager's mind," says Prizant.

Perceptions of performance evaluation effectiveness are higher when reviews happen more frequently than annually and are associated with 11% more engagement, 8% more favorable views of fairness, and a 5% greater likelihood that employees say their performance has improved.[1]

"Employees should consistently know what they are doing well, where they need to improve, and what is expected of them," says Prizant. "Feedback also has much more impact when it is given close to the moment, when the situation is still fresh and the employee can connect the feedback to what actually happened."

To make the most of employee evaluations, consider the following advice:

Set Clear Expectations from the Start

Beverly L. Parnell, CMA (AAMA), has been the practice manager at Family Physicians of Evans in Georgia for 30 years. Her evaluations are divided into two parts: code of conduct and job-specific standards. "When we have a new hire, I give them a copy of their job description and a copy of the evaluation so that there is a clear understanding of what's expected," she says.

The evaluation system uses a simple 1–3 scale. A score of 1 signals an employee needs improvement, a 2 is the minimum that the company expects from everyone, and a 3 is reserved for those considered exceptional.

Prioritize Evaluations and Feedback

While managers are often pulled in multiple directions, Prizant notes that evaluations and regular feedback should not continually get pushed aside because something else feels more urgent. "When that happens, employees notice," she says. "Prioritizing your team means creating time for those conversations throughout the year, not rushing through an evaluation at year-end because the form is due."

Provide Detail

Telling an employee they did a good job is encouraging but not specific. Prizant suggests saying something like, "Great job with how you helped de-escalate that situation in the waiting room. You remained calm, listened to the patient's concerns, and found a solution."

Specific examples of challenges and areas for development are also insightful. "And if you have been providing regular feedback, this should not be the first time the employee is hearing about either the things they are doing well or the areas where they need to improve," says Prizant.

Discuss Issues

When Brittany Henning-Wolfe, CMA

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Tips for Delivering Difficult Evaluations

Giving a staff member a bad evaluation is never easy. However, Julianne Prizant offers the following tips:

Do not make it a surprise. If there are performance concerns, the employee should have heard about them before the formal evaluation. "[We] would be doing the employee a disservice if we soft-pedaled the feedback or skimmed over the difficult parts simply because they make us uncomfortable," says Prizant.

Be direct, respectful, and specific. Avoid vague statements like, "You need to have a better attitude" or "You aren't a team player." Instead, Prizant suggests using the SBI (Situation, Behavior, Impact) method. "Describe the specific situation, identify the behavior you observed, and explain the impact that behavior had. Then be clear about the expectations going forward," she says.

For example, consider saying, "Over the past month, there have been three occasions when you arrived after the first patient was scheduled. When that happens, another team member has to step away from their responsibilities to cover yours, which affects the rest of the team and potentially the patient experience. Going forward, I need you here and ready to work before the first scheduled patient."

Give the employee an opportunity to respond. There may be information or circumstances you are not aware of. "That does not mean the expectation automatically changes, but it may change how you approach the solution," says Prizant.

Ultimately, the goal of difficult feedback is not to make someone feel bad about what happened. "It is to make sure they understand what needs to change and give them a fair opportunity to make that change," says Prizant.

(AAMA), a practice manager at Dermatology and Skin Surgery Associates in Tinley Park, Illinois, had a new employee who was dealing with personal issues that were affecting her performance at work, Henning-Wolfe sat down with her to talk about how it was impacting her work. "She did not realize how much it was affecting her and thought she was doing well," says Henning-Wolfe. "After talking through her performance and looking at some specific areas, she was able to see where she was struggling and how the situation was holding her back."

The conversation led to more frequent weekly check-ins. "The additional check-ins seemed to help, and we saw some improvement in her work performance," says Henning-Wolfe.

Be Careful with Others' Feedback

Although soliciting feedback from others who work with an employee can give perspective, Prizant cautions it can also introduce subjectivity. "Some people naturally grade harder than others," she says. "One person's 'meets expectations' may be another person's 'exceeds expectations.'"

If you ask others for input, she suggests giving them clear criteria and asking for specific examples rather than simply asking: How is this person doing? "The goal is to evaluate the employee against the expectations of the role, not against each reviewer's personal definition of *good*," says Prizant.

Embrace a Two-Way Conversation

Henning-Wolfe asks staff to complete the same evaluation form as their manager to make the process more collaborative and give employees a chance to share their perspective.

Prizant suggests asking employees for their perspective with engaging questions:

- What are you most proud of?
- Where do you feel you have grown?
- What has been challenging?
- What would help you be more successful?

"Their answers may give you a perspective you would never get by simply going line-by-line through an evaluation form," she says.

Set Clear Goals

During a review, Henning-Wolfe helps employees set goals that focus on improving performance while also creating opportunities to learn new skills and take on new responsibilities. For instance, if an employee is struggling, she helps identify the reason, such as a need for additional training, an unclear process, or personal circumstances. Then she provides appropriate support. "Continue to track progress and revisit goals and evaluations regularly to make sure the employee is moving in the right direction," says Henning-Wolfe.

Understanding what motivates the employee can help set realistic, achievable goals. "Make sure rewards and recognition are connected to the goals and the effort the employee is putting in," says Henning-Wolfe.

Conducting quarterly goals can give work context, adds Prizant. "Particularly when an employee's goals can connect to a larger goal of the practice," she says. "Employees can see what they are working toward and how their contribution supports what the practice is trying to accomplish."

For example, a medical assistant who wants to take on more responsibility might lead an effort to improve a workflow that is creating delays. Checking in on this after a quarter can evaluate how the practice benefits from the process while the employee develops skills in problem-solving, communication, and leadership.

Quarterly goals can also make progress more manageable and relevant. "A goal that made perfect sense in January may no longer make sense in March because priorities, staffing, systems, or the needs of the practice have changed," says Prizant.

Lastly, help staff identify what it will take to achieve the goal by answering: What specific actions will lead to the result? What does the employee need to do differently or consistently? What support or resources do they need? "If you cannot identify the actions that should lead to the outcome, you probably do not yet have a well-defined goal," says Prizant. ✦

References

1. Quantum Workplace. Research-based tips for designing effective performance reviews. Accessed October 15, 2026. https://help.quantumworkplace.com/research-based-tips-for-designing-effective-performance-reviews