



Mid-Year Review Toolkit

How to Ignite Employee Potential
Through Meaningful Feedback



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EXECUTIVE SUMMARY



In today's tight labor market, talent development is the key to *HR success*.

94%

of employees say they would stay with a company longer if it offered more learning opportunities.

(HR Executive)

If you want to drive retention, you need to invest in your team.

The problem is, HR is so bogged down by administrative tasks, leaders don't have the time to identify high performers – much less develop them. Performance reviews are routine at best, and at worst they feel like a waste of everyone's time. It's no surprise that 95% of managers are dissatisfied with their employee evaluation process (*SHRM*).

Everyone deserves better.

Mid-year performance reviews are valuable opportunities for leaders to connect with their teams. **When done well, this process helps HR expand the talent pipeline, optimize labor spend, and create a robust, inclusive succession plan.**

Use this mid-year review toolkit to streamline the mid-year review process: identify high potential, support struggling team members, and nurture top talent to drive results.

Conducting Mid-Year Reviews

Employee performance reviews might start as private conversations, but they have a major impact on company culture. These meetings are the best way to align an employee's professional goals with the company's long-term plan. Managers are uniquely positioned to offer career advice that empowers workers to grow, develop core competencies, and work toward the business's Objectives and Key Results (OKRs) – all at the same time.

This process only works if both managers and employees give meaningful feedback. Open, transparent communication helps people on both sides of the table identify which skills they need to improve. **At their best, mid-year reviews inspire everyone on your team to take action in ways that benefit their careers, the department, and the company at large.**



THE POWER OF MEANINGFUL FEEDBACK

When employee reviews get repetitive, they can feel like a waste of managers' time – a box to tick off your compliance checklist, and nothing more. That's a missed opportunity. Done well, mid-year performance reviews have a wealth of benefits. This process should empower leaders to:

- **Build relationships with direct reports.**
- **Identify career goals for everyone on the team.**
- **Offer support for struggling employees.**
- **Drive long-term, sustainable business results.**

Effective performance reviews depend on meaningful feedback. But remember – meaningful doesn't always mean positive. Managers should affirm positive performance and offer constructive criticism. And if an employee is doing everything perfectly, it's probably time for them to take on new responsibilities.

Use these tips to deliver meaningful feedback:

1. **Lead with empathy.** You can always be kind and compassionate, even if you have difficult information to share.
2. **Stick to the facts.** Give the employee specific examples of the behavior you want to discuss. Include relevant details and do your best to stay objective.
3. **Provide context.** Relate the employee's performance to their job description, long-term career goals, and the company's mission.
4. **Listen.** Effective performance reviews are conversations, not lectures. Managers should encourage feedback and take their team's concerns to heart.
5. **Set specific goals.** Defining clear goals motivates employees to grow and empowers managers to measure their progress.



How Paycor Helps

After employees receive feedback, they need the tools to put it into practice. Paycor's **Learning Management System** empowers employees to develop their skills on their own schedules. HR can make learning easy with modular, self-paced training available on desktop and mobile.

LEARN MORE: [PERFORMANCE APPRAISAL EXAMPLES](#)

EMPLOYEE MID-YEAR REVIEW TEMPLATE

Review Period:

Employee Name:

Review Date:

Job Title:

Department:

Goals From Last Review Period:

List goals from the previous evaluation. If the employee was hired within the last 6 months, list any goals set during the onboarding process.

How would you describe your performance over the past six months?

Did you achieve the above goals?

What were your biggest wins during this review period?

EMPLOYEE MID-YEAR REVIEW TEMPLATE

What are your most significant areas of opportunity?

List your goals for the upcoming review period:

What, if any, support do you need from your manager to reach your goals?

Is there anything else you'd like the leadership team to know?

SUPERVISOR MID-YEAR EVALUATION TEMPLATE

Supervisor Name:

Supervisor Job Title:

Review Period:

Employee Name:

Review Date:

Job Title:

Department:

Key Responsibilities and Objectives:

Strengths and Wins:

Areas for Development:

SUPERVISOR MID-YEAR EVALUATION TEMPLATE

Goals for Next Review Period (SMART goals):

General Comments:

Employee Signature:

Reviewer Signature:

Identifying High-Potential Talent

There's a difference between performance and potential. Some of your most productive employees might be doing well because their current job is such a perfect fit – and switching titles or departments would be a mistake. By the same token, some of your highest-potential workers could be struggling in their current roles.

As we navigate the ongoing talent shortage, HR needs to look past traditional strategies for hiring and promoting future leaders. Establish benchmarks unique to your company, instead of relying on potentially outdated best practices. Then, evaluate employees based on the criteria that will really set them up for success – not just the ones that look good on paper.



HOW TO EVALUATE TOP PERFORMERS

Your current employees are a valuable part of your talent pipeline – and they might just be your company’s future leaders. But before you can upskill your team, you need to evaluate their skills. Enter the 9-Box method, a simple yet powerful framework that helps leaders assess and categorize employees based on two critical dimensions: **performance** and **potential**. Here’s how to use it:



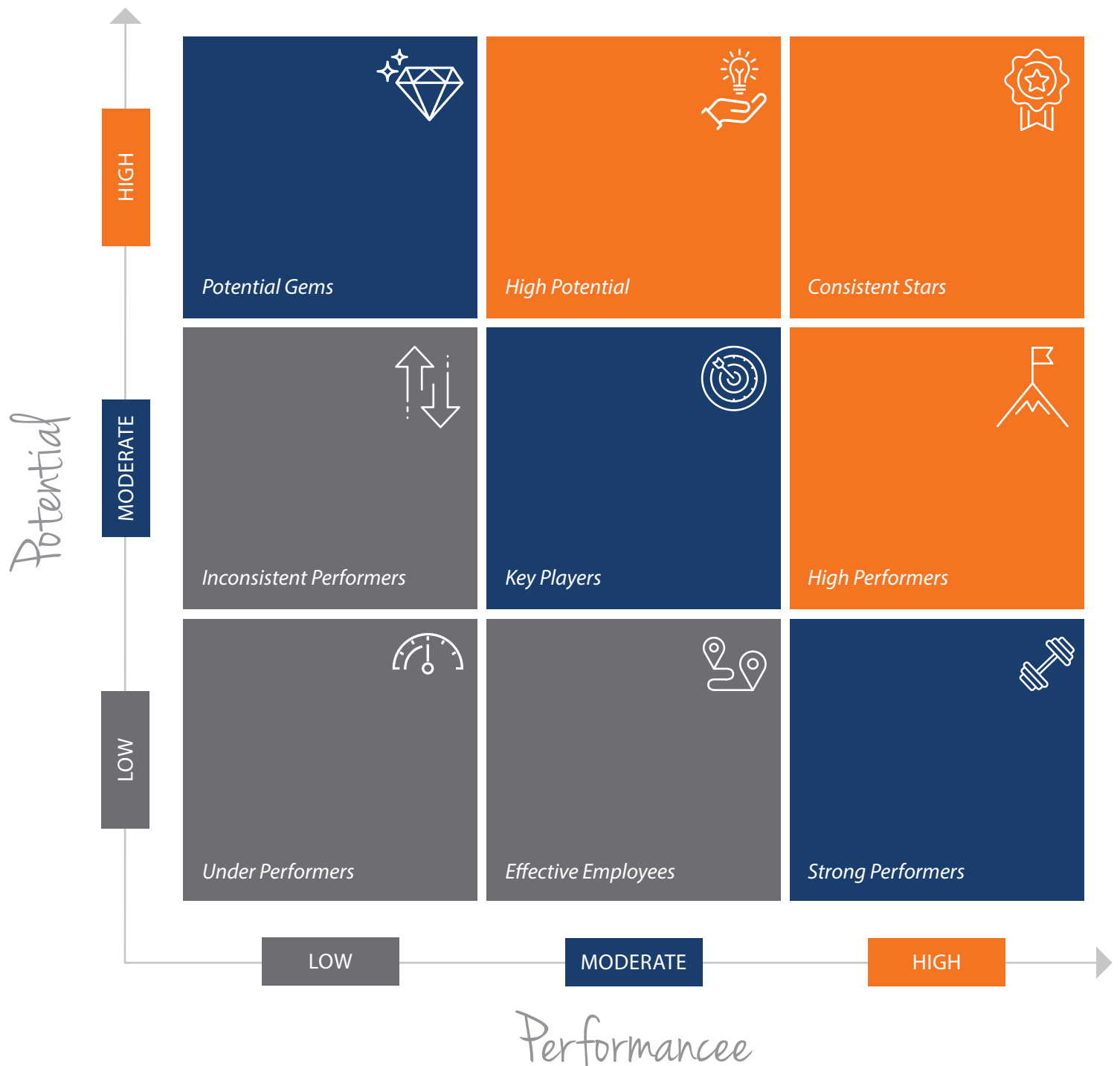
- 1. Establish performance benchmarks.** Work with other company leaders to define clear, specific metrics for employee success. These could be sales targets, customer satisfaction scores, project completion rates, or other criteria unique to your business.
- 2. Define leadership qualities.** Evaluating employee potential can be very subjective. To make this assessment as fair as possible, HR should define specific qualities that align with the company’s values.
- 3. Identify sources of performance data.** To ensure an accurate assessment, leaders should draw on as many sources as possible, like quantitative metrics, qualitative feedback, and input from the employee’s peers, supervisors, and subordinates.
- 4. Set a cadence for feedback.** Make sure employees know when to expect their next review. Mid-year reviews can be highly motivating because they encourage workers to achieve short- and long-term performance goals.
- 5. Involve the right stakeholders.** The 9-Box method depends on collaboration between key stakeholders, including HR, managers, teammates, and employees themselves. Open communication fosters trust and makes team members more receptive to coaching.

How Paycor Helps

Paycor’s **Talent Management Software** fosters a culture of feedback, employee recognition, and team spirit. Managers can use tools like the 9-Box grid to track key metrics, evaluate employee performance, and upskill their teams.

LEARN MORE: [MASTERING THE 9-BOX METHOD](#)

9-Box Grid Method



Improving Employee Performance

Everyone wants to be good at their job. But, despite HR's best efforts, some workers are bound to run into performance issues. Left unchecked, these problems can have a major impact on the rest of your team – not to mention your business results.

Leaders should support struggling team members as they work to improve – but continue to hold them accountable. If you don't offer enough support, you could increase involuntary turnover and leave recruiters scrambling to fill open roles. On the other hand, coddling some of your employees puts an unfair burden on high performers, potentially damaging engagement, lowering productivity, and increasing voluntary turnover. **Here's how to strike the balance.**



HOW TO SUPPORT STRUGGLING WORKERS

If an employee is failing to meet expectations, they should receive direct feedback as quickly as possible. If the quality of the employee's work doesn't change within a set period of time, HR should collaborate with their manager to implement a performance improvement plan (PIP).

A PIP is a formal process that addresses ongoing performance issues. These plans set clear expectations for how the employee needs to improve, including a timeline, check-in dates, and expected results. Documenting the process protects HR whether the employee stays or leaves after their PIP.

How Paycor Helps

Paycor's **Compliance Software** empowers leaders to track and store critical documentation. When you part ways with an employee, these tools help protect your business from potential legal disputes.

PIPs can address a wide variety of issues, including but not limited to:

- Poor quality of work
- Attendance problems
- Behavioral issues
- Failure to meet deadlines



PIPs should not be implemented as a punishment. Instead, managers should frame them as an opportunity for employees to get support and improve their performance at work, ultimately growing their careers.

LEARN MORE: [PERFORMANCE IMPROVEMENT PLANS](#)

PERFORMANCE IMPROVEMENT TEMPLATE

Employee Name: _____

Date Plan Presented: _____

Length of Plan: _____

End Date: _____

Your role is critical to the success of our organization. Currently, your performance is not meeting the Company's expectations in several areas, which are discussed in more detail below.

The Company is committed to helping you succeed. At this time, we have turned to the Management Team to collaborate with you, to develop a plan to help mitigate issues and provide guidance and support to achieve agreed-upon performance excellence outcomes.

The Management Team has decided to place you on a Performance Improvement Plan (PIP). Shortly after the end date, the Management Team will meet to decide whether you have successfully completed the Performance Improvement Plan.

There are three potential outcomes:

1. Successful completion of the PIP
2. Extension of the PIP
3. Termination of employment

This Performance Improvement Plan is not intended to be an employment contract or a guarantee of continuing employment. The Company does not promise that you will remain employed until the end of the plan. Should you fail to make progress or should your performance or behavior decline during the PIP, you may be terminated.

Performance Failing to Meet the Company's Minimum Expectations:

- | | | | |
|---------------------------------------|-------------------------------------|--|---------------------------------------|
| <input type="checkbox"/> Productivity | <input type="checkbox"/> Efficiency | <input type="checkbox"/> Teamwork | <input type="checkbox"/> Quality |
| <input type="checkbox"/> Attendance | <input type="checkbox"/> Conduct | <input type="checkbox"/> Communication | <input type="checkbox"/> Other: _____ |

Examples of Performance Failing to Meet the Company's Minimum Expectations

PERFORMANCE IMPROVEMENT TEMPLATE

Deliverables and/or Other Expectations:

Summary & Acknowledgment:

Successful completion of this PIP is necessary for your continued employment with the Company. The Management Team is committed to helping you achieve these goals, so please do not hesitate to reach out if you have questions or concerns regarding the deliverables listed in this document. To help you achieve these goals and provide you with regular feedback regarding your progress, your manager will meet with you bi-weekly during the course of the PIP. The dates of these meetings are listed below for your reference; it is imperative that you attend each meeting.

The Performance Improvement Plan above has been carefully reviewed and agreed to by the Employee and Manager as listed below.

Plan Accepted by (Employee Signature): _____ Date: _____

Plan Presented by (Manager Signature): _____ Date: _____

PERFORMANCE IMPROVEMENT TEMPLATE

Instructions for Establishing an Employee Performance Improvement Plan – For Management Use Only –

This performance plan may or may not take the place of oral or written disciplinary action and may or may not be used to supplement an oral or written corrective action, as appropriate.

1. The Manager will fill out the PIP based on all available information and ensure that it is easy to understand and provides expectations and goals that the employee is able to meet. If the Manager does not feel that the employee will be able to meet the established goals, they should speak with Human Resources to discuss other options.
2. The Manager will review the PIP with the Department Manager and the Human Resources Manager. Any agreed-upon recommendations will be incorporated into the Manager's outline.
3. The Manager will meet with the employee in a confidential setting and review the performance standards, the employee's related performance issues, and the corrective actions prescribed by the plan. The Manager should consider the employee's input as appropriate.
4. The Manager and employee will discuss the established timelines for improved performance on each expectation to ensure they are reasonable; this should be documented under Deliverables and Other Expectations.
5. The Manager should articulate that success in the plan is necessary for continued employment, but that failure to progress or meet expectations or deadlines may also result in termination.
6. The Manager should get the employee's signature and date on the form indicating agreement with the performance improvement plan. In most cases, an employee's refusal to sign will result in immediate termination. Managers should discuss this possibility with HR in advance of meeting to ensure that everyone agrees as to the appropriate response.
7. Employees should be provided with a copy of the signed plan for their reference.
8. Periodic reviews (1 to 6, based on the complexity and duration of the PIP) will be conducted on a regular basis with the employee. The Manager and employee will initial each progress review.
9. At the end of the performance plan period, the Management Team will determine if the performance plan was satisfactorily completed, if it should be extended, or if the employee should be terminated.
10. The Manager should retain the original signed PIP for the duration of the performance plan. Upon completion of the plan, the original PIP should be placed in the employee's personnel file.

PERFORMANCE IMPROVEMENT TEMPLATE

Date	Comments

For Management Team Use Only:

Select An Outcome

- ☐ Performance Improvement Plan satisfactorily completed on _____
- ☐ Performance Improvement Plan extended to _____
- ☐ Termination of Employment recommended on _____



Paycor Empowers Leaders to Drive Business Results

Paycor's HR, payroll, and talent platform connects leaders to people, data, and expertise. We help leaders drive engagement and retention by giving them tools to coach, develop, and grow employees. We give them unprecedented insights into their operational data with a unified HCM experience that can seamlessly connect to other mission-critical technology. By providing expert guidance and consultation, we help them achieve business results and become an extension of their teams.



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