

FRAMEWORKS
SERIES

The Performance Review Framework

A FAIRER, MORE CONSISTENT MODEL
FOR PERFORMANCE CONVERSATIONS



PREPARE



DELIVER



CALIBRATE



FOLLOW-
THROUGH



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WHY THIS FRAMEWORK
EXISTS

Performance Reviews Should Build Trust, Not Just Rate It.

Every organization rates performance. Great organizations make the rating the least important part of the conversation.

The Performance Review Framework was created to help managers and HR leaders run performance conversations that are fair, evidence-based, and consistent from one manager to the next.

Too often, reviews are rushed, shaped by whatever happened most recently, and delivered as a surprise. This framework treats the review as the final step of an ongoing conversation, not a once-a-year event.

Whether reviewing an individual contributor or calibrating ratings across an entire team, lasting trust in the process begins with clear evidence, honest delivery, consistent standards, and real follow-through.

Prepare with evidence. Deliver with clarity.
Calibrate for fairness. Follow-through on growth.



THE PERFORMANCE REVIEW FRAMEWORK



Why Reviews Break Down

Most reviews don't fail on the rating. They fail in how the year's evidence gets gathered and delivered.

The Review Breakdown



Manager Side

- Prep happens the night before, from memory
- Recency bias – the last six weeks outweigh the year
- Hard truths get softened or skipped entirely
- Rating chosen first, justification written after

Employee Side

- Feedback feels like a surprise, not a summary
- Unclear how the final rating was actually reached
- No real development plan comes out of it
- Wonders if their manager even remembers the year

Root-Cause Canvas: Why Ratings Go Wrong

Separate symptoms from underlying causes before redesigning the process.

EFFECT:

Ratings vary significantly by manager, with no clear pattern beyond who happens to lead the team.

PEOPLE

Managers weight recent work far more heavily than the full period.

POLICY

Rating scale definitions are vague enough to interpret differently team to team.

SYSTEMS

No shared place to log evidence as it happens throughout the year.

HANDOFFS

Self-reviews and manager reviews are written independently, then reconciled last-minute.

DATA

Prior cycle's goals aren't referenced when writing the current rating.

ENVIRONMENT

Calibration sessions are optional, so inconsistent managers simply skip them.

The Framework by Numbers

4

Pillars, applied in sequence
every review cycle

1

Rating scale, defined once
and used consistently

90

Day prep window before every
formal review

The Performance Review Framework isn't a once-a-year form — it's a cadence of evidence-gathering and calibration that culminates in one honest conversation.

Rating Scale Definitions

Rating	Definition	What Evidence Looks Like
<i>Exceptional</i>	Consistently exceeds expectations across all core responsibilities with sustained impact	Multiple dated examples across the full period showing above-goal outcomes
<i>Exceeds Expectations</i>	Performs above the expected level in most core responsibilities	Clear examples where results exceeded the stated goal
<i>Meets Expectations</i>	Reliably performs core responsibilities at the expected level	Consistent, dated evidence of goal achievement
<i>Below Expectations</i>	Falls short of the expected level in one or more core responsibilities	Specific, documented gaps with dates and impact
<i>Unsatisfactory</i>	Consistently fails to meet core responsibilities despite feedback	Documented pattern of gaps with prior feedback given

Four Pillars, One Cycle

Each pillar answers a different question – together, they turn a rating period into a fair, trusted conversation.

1

Prepare

What's the real evidence?

2

Deliver

How do I say it clearly?

3

Calibrate

Is this consistent across the team?

4

Follow-Through

What happens next?

01



Pillar One: Prepare



Prepare: Build the Evidence Base

Gather evidence across the full period – not just what’s easiest to recall.

Core Activities

- Pull specific, dated examples across the entire review period
- Review goals and commitments set at the last cycle
- Gather peer or cross-functional input where relevant
- Separate what happened from how it made you feel

Signals You’re Ready to Move On

- You have at least one dated example per core competency
- You could justify the rating without the employee in the room
- Examples span the full period, not just the last month
- You’ve reviewed last cycle’s goals before writing this one



Performance Evidence Worksheet

Use this worksheet to log evidence as it happens, not just before the review.

Competency	Example/Evidence	Date	Rating Lean
[Competency 1]	[Specific, dated example]	[Date]	[Meets / Exceeds / Below]
[Competency 2]	[Specific, dated example]	[Date]	[Meets / Exceeds / Below]
[Competency 3]	[Specific, dated example]	[Date]	[Meets / Exceeds / Below]



Self-Review Guidance for Employees

*What a strong self-review contributes to the **Prepare** pillar.*

- Reflect on your actual goals, not just recent work
- Include specific, dated examples for each core responsibility
- Note what you'd do differently, not just what went well
- Flag anything you want your manager to know before the conversation



02



Pillar Two: Deliver



Deliver: Say It Clearly

The rating shouldn't be the hardest part to say out loud.

Core Activities

- Lead with the overall rating – don't bury it in a story
- Use the Situation-Behavior-Impact structure for each point
- Leave real room for the employee's reaction and questions
- End with what's next, not just what happened

Signals You're Ready to Move On

- You can say the rating in the first two minutes
- Every point of feedback has a specific example attached
- The employee has spoken for more than half the meeting
- You've written down what happens next before the meeting ends



Review Conversation Script & Talking Points

A structure for opening and running the conversations themselves.

Moment	What to Say/Do
Open	State the purpose and the overall rating first, plainly
Evidence	Walk through 2-3 concrete examples using Situation-Behavior-Impact
Pause	Ask directly: "What's your reaction to that?" — then stay quiet
Close	Restate the rating, the development focus, and the next check-in date

Continuous Feedback Integration

The formal review should summarize an ongoing conversation, never start one.

Core Activities

- Log notable feedback moments in the Evidence Worksheet as they happen
- Reference prior feedback conversations explicitly during **Deliver**
- Treat the formal review as a summary, never the first time an issue is raised

Signals It's Working

- Nothing in the formal review is news to the employee
- **Evidence** Worksheet entries exist from multiple points across the period
- Manager can point to an earlier conversation about each development area

Pillar Three: Calibrate



Calibrate: Keet It Fair

A rating means nothing if it depends on which manager gave it.

Core Activities

- Compare ratings and justifications across managers before finalizing
- Flag any rating that's an outlier without strong documented evidence
- Discuss borderline cases as a group, not one-on-one with HR
- Document the reasoning for any rating that gets adjusted

Signals You're Ready to Move On

- Every manager can explain their ratings using the same standard
- Outlier ratings have been discussed, not just approved
- Rating distribution looks reasonable across similar roles
- Adjustments are documented with a clear reason

Calibration Matrix

Use this matrix to compare ratings and evidence across a team before finalizing.

Employee	Manager	Proposed Rating	Key Justification	Calibration Notes
[Name]	[Manager]	[Rating]	[1-line evidence]	[Adjusted / Confirmed]
[Name]	[Manager]	[Rating]	[1-line evidence]	[Adjusted / Confirmed]
[Name]	[Manager]	[Rating]	[1-line evidence]	[Adjusted / Confirmed]

Governance Model

Clarify who owns each decision, so calibration doesn't stall on ambiguity.

EXECUTIVE SPONSOR

Sets the rating scale and calibration standard org-wide; resolves escalated disputes

HR PARTNER

Facilitates calibration sessions and audits documentation for consistency

MANAGER

Owens Prepare, Deliver, and Follow-Through for their direct reports

EMPLOYEE

Contributes self-review evidence and owns their development plan actions

RACI Matrix for the Review Cycle

Assign accountability across every activity in the c

Activity	Responsible	Accountable	Consulted	Informed
Prepare evidence	Manager	Manager	Employee	HR Partner
Write self-review	Employee	Employee	Manager	—
Deliver review	Manager	Manager	HR Partner	Employee
Calibrate ratings	HR Partner	Executive Sponsor	Manager	Employee
Build development plan	Manager + Employee	Manager	HR Partner	Executive Sponsor

04

Pillar Four: Follow-Through





Follow-Through: Make It Matter

A review that ends at the signature line was never really finished.

Core Activities

- Convert the conversation into a dated, specific development plan
- Schedule a mid-cycle check-in before the meeting ends
- Tie development goals to real opportunities, not generic training
- Revisit the plan at the next 1:1, not just next review season

Signals You're Ready to Move On

- The employee leaves with a written development plan
- A mid-cycle check-in date is already on the calendar
- Development goals are specific enough to measure
- The plan gets referenced again before the next formal review

Post-Review Development Plan Template

Complete this together, in the room, before the conversation ends.

Field	What Goes Here
Development Focus	[1-2 specific skills or behaviors]
Supporting Action	[Training, stretch project, mentorship — specific, not generic]
Success Looks Like	[Observable behavior or outcome by next check-in]
Mid-Cycle Check-In Date	[Specific date, scheduled before leaving the room]

Manager Prep Checklist

A final check before walking into any formal review conversation.

- ☐ Evidence Worksheet is complete with dated examples for every competency
- ☐ Last cycle's goals have been reviewed against this cycle's evidence
- ☐ Self-review has been read before drafting the manager's own rating
- ☐ Proposed rating and justification are ready before calibration
- ☐ Development plan draft is ready to finalize live in the conversation

Cadence At A Glance

Pillar	Frequency	Typical Owner	Primary Output
Prepare	Ongoing, formalized 90 days pre-review	Manager	Evidence worksheet
Deliver	Once per formal review cycle	Manager	Documented conversation
Calibrate	Once per cycle, before ratings finalize	HR / Manager group	Calibrated rating set
Follow-Through	Immediately, then ongoing	Manager + Employee	Development plan

Metrics that Signal Review Health

Metric	What It Tells You
% of reviews completed on time	Whether Prepare and Deliver are actually happening on schedule
Rating distribution by manager	Whether Calibrate is catching inconsistency across the team
% of reviews with a documented development plan	Whether Follow-Through survives past the meeting itself
% of employees reporting the rating was expected	Whether Deliver removed the element of surprise

Common Pitfalls to Avoid

Pitfall	Why It Happens	Fix
Recency bias	The last few weeks are easiest to remember	Require dated evidence from across the full period
Rating inflation	Managers want to avoid a hard conversation	Calibrate ratings across managers before finalizing
Surprise feedback	Issues went undiscussed until the formal review	Address concerns in 1:1's well before review season
Calibration skipped	It feels like an extra, optional step	Build it into the cycle as a required gate, not an option

Documentation Best Practices

General practice guidance for keeping review records clear and consistent – not a substitute for legal advice.

- Document specific behaviors and outcomes, not personality judgments
- Use dates and concrete examples, never vague characterizations
- Keep documentation format consistent across every employee
- Store records according to your organization's retention policy
- When a documentation question has legal implications, involve legal counsel or your compliance team



Performance Review Maturity Model

Assess how consistently the organization applies the framework.

1 · REACTIVE

Behaviors: Reviews happen once a year with little prep.

Evidence: No shared evidence log exists.

Next move: Introduce the Evidence Worksheet org-wide.

2 · DEFINED

Behaviors: Reviews are consistent in format but rarely calibrated.

Evidence: Written ratings exist but vary widely by manager.

Next move: Run a first calibration session.

3 · MANAGED

Behaviors: Calibration happens every cycle.

Evidence: Rating distribution is monitored across the org.

Next move: Formalize development-plan follow-up.

4 · OPTIMIZED

Behaviors: Continuous feedback flows directly into formal reviews. **Evidence:** Nothing in a review is ever a surprise.

Next move: Mentor other departments through calibration.

Your First 30 Days With The 4A Framework

Weeks 1-2

Run **Assess**: 6-8 stakeholder interviews, plus a data pull

Draft a one-page summary of findings

Week 3

Run the **Align** workshop and lock 3-5 priorities

Get sponsor sign-off in writing

Week 4

Run **Activate**: assign owners and 90-day milestones

Put the first **Advance** review on the calendar before you finish the week

Questions Teams Usually Ask

Q1. What if a manager refuses to calibrate?

Make calibration a required gate before ratings finalize – not an optional discussion managers can help.

Q2. How do we handle a rating dispute?

Document the employee's perspective, revisit the specific evidence together, and involve HR if agreement isn't reached.

Q3. Should self-reviews factor into the rating?

Yes, as one input – self-reviews surface evidence the manager may have missed, not a vote on the final rating.

Q4. How is this different from continuous feedback?

This framework doesn't replace ongoing feedback – it's the structured, evidence-based capstone that formal feedback should build toward.

Case Snapshot: A Team With Inconsistent Ratings

Case #1

A 40-person department had five managers rating performance on the same 5-point scale — but average ratings varied by nearly a full point between managers, with no clear pattern beyond "who your manager happened to be."

Case #2

Prepare surfaced that two managers were relying almost entirely on the last month's work, with little documented evidence from earlier in the year.

Case #3

Calibrate brought all five managers into one session to compare ratings and evidence side by side; three ratings were adjusted, each with documented reasoning.

Case #4

By the next cycle, rating spread across managers had narrowed significantly, and employee survey comments about "fairness of my review" improved measurably.

Scaling Across Multiple Teams

How this framework holds up beyond a single team.

- Standardize the Evidence Worksheet and rating scale across every team before scaling.
- Run cross-department calibration, not just within-team, for roles that are genuinely comparable.
- Give HR Partners visibility into rating distributions across the full organization, not just one team.
- Revisit the rating scale definitions annually as the organization's expectations evolve.

Your First 30 Days With the Framework

Weeks # 1-2

- Start logging evidence with the Prepare worksheet for your team
- Review last cycle's goals for each direct report

Week #3

- Draft ratings and evidence for each employee
- Schedule the calibration session with fellow managers

Case #3

- Run calibration and finalize ratings.
- Deliver reviews using the conversation script, and put every mid-cycle check-in on the calendar before you finish this week



Bring the Performance Review Framework to Your Team

A structured cycle – not a once-a-year form.

- **Prepare** with dated evidence, not memory
- **Deliver** the rating clearly, with room for their reaction
- **Calibrate** across managers before ratings finalize
- **Follow-Through** with a real, dated development plan

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Too often, reviews are shaped by whatever happened most recently and delivered as a surprise. This framework treats the review as the final step of an ongoing conversation.

Whether reviewing one person or calibrating an entire team, lasting trust begins with evidence, clarity, consistency, and real follow-through.



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"I help organizations turn good intentions into structured, repeatable systems that drive clarity, alignment, and measurable results".

Bringing Structure to Complexity. Turning Strategy into Results.

Sheila Mayoral is a strategist, author, and designer who works at the intersection of HR, learning and development, and organizational operations. With more than 15 years of cross-functional experience, she partners with leaders to simplify complexity, strengthen performance, and build systems that scale.

Her work spans strategic operations, HR technology, project management, organizational effectiveness, process optimization, learning and development, and change enablement—across industries that include commercial real estate, healthcare, manufacturing, government, insurance, financial services, education, and professional services.

Sheila created the Cognitif Design Framework Series to share practical, results-driven resources that help leaders think clearly, make confident decisions, and create lasting impact.

WHAT I BRING TO THE TABLE



STRATEGIC THINKING

Aligning people, process, technology, and strategy to move organizations forward.



PRACTICAL FRAMEWORKS

Creating simple, repeatable models that leaders can apply immediately.



EXECUTION FOCUS

Bringing structure, accountability, and clarity to turn ideas into measurable results.



CONTINUOUS IMPROVEMENT

Helping teams learn, adapt, and build better systems over time.

“ Good intentions start the conversation. Structured systems create the change. ”



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