



FIELD NOTES / PEOPLE AND PERFORMANCE

Your Performance Review Needs a Job Description

Write a six-line job description for the review: its purpose, inputs, responsibilities, output, boundaries and follow-up.

WHAT YOU WILL DO

Give the review a six-line job description, then check that the meeting delivers the decision and next action it promises.



SOURCE



INSIGHT



APPLICATION

ARTICLE / FILLABLE WORKSHEET / SOURCE NOTES



Write the review's job description

A performance review can rate past work, help someone develop or decide what support they need. Give the meeting itself a short job description so everyone knows what it must achieve. The employee's role expectations remain an input to that conversation.

GTMA proposal: write six lines before setting the agenda: purpose, inputs, responsibilities, output, boundaries and follow-up. Share them with the employee. This gives you a concrete brief to question or change before the meeting starts.

What the research can support

A 2022 study in *Frontiers in Psychology* reports a positive relationship between developmental performance appraisal and job meaningfulness in its statistical model. Researchers received 295 questionnaires from pharmaceutical salespeople in Khyber Pakhtunkhwa, Pakistan, using convenience sampling and a time-lag design. [1]

This association does not establish causation, revenue uplift or an effect for a SaaS team. The study does not test this job-description template or show that separate meetings outperform combined reviews. The template is GTMA's proposed application.



A completed job description

Fictional example: Maya manages an account executive who missed the agreed quarterly target and wants help with procurement conversations. She writes this job description for their review:

Purpose: record performance against the agreed role expectations and choose one development action.

Inputs: the agreed target, recorded results and one recent procurement plan. Flag missing evidence before deciding.

Responsibilities: Maya explains the performance assessment; the seller identifies where procurement preparation became difficult. They agree who will support practice.

Output: a documented performance assessment plus one procurement conversation to practise, with a named support person.

Boundaries: the assessment follows the existing rating and pay process. Explain how development notes will be used; promise no confidentiality the organisation cannot provide.

Follow-up: at the next one-to-one, inspect the revised procurement plan and ask whether the agreed support helped. A later sale would not prove that the review caused it.

Use the brief to change the agenda

Evaluation and development can stay in one meeting when the agenda clearly marks each purpose. If a decision needs missing evidence or a different decision-maker, arrange a follow-up for that part.

If the seller is blocked by unclear pricing authority, assign that decision to an owner before prescribing more coaching. Use the worksheet to write your six-line job description, then check whether the meeting produced its stated output. This is a practical clarity check, not a validated measure of appraisal effectiveness.



Worksheet: the review's job description

Complete this for one upcoming review. Keep personal and sensitive employee information in your organisation's approved systems.

Type into the fields, or print. Save a copy to retain your answers.

01 / Purpose

What must this review decide? Name evaluation, development, support or an explicit combination.

02 / Inputs

Which role expectations and work evidence will you use? What is still missing?

03 / Responsibilities

Who assesses performance, contributes evidence, makes the decision and supports the next action?

04 / Output

What written decision or agreed next action must exist when the meeting ends?

05 / Boundaries

What affects rating or pay? Explain how development notes will be used and what is outside this meeting.

06 / Follow-up

Who checks the agreed output, and when? Note any process decision or evidence needed before further coaching.



Read further. Know the limits.

Source findings, GTMA proposals and fictional examples have different roles. Use the original research to examine its methods and context.

[1] What matters when examining the performance of salespersons? Analyzing the boundary conditions of personal dispositional factor

Frontiers in Psychology / Published: 2022-12-05

295 questionnaires from pharmaceutical salespeople in Khyber Pakhtunkhwa, Pakistan; convenience sample and time-lag design. Qualified attributed association with job meaningfulness, not causal or SaaS revenue evidence.

<https://www.frontiersin.org/journals/psychology/articles/10.3389/fpsyg.2022.1006270/full>

The finding and its limits

295 questionnaires from pharmaceutical salespeople in Khyber Pakhtunkhwa, Pakistan; convenience sample and time-lag design. Qualified attributed association with job meaningfulness, not causal or SaaS revenue evidence.

Job meaningfulness is the reported outcome. The study does not test the proposed meeting brief, establish revenue uplift or prove that developmental appraisal causes the association.

What GTMA proposes

The six-line job description and worksheet are GTMA proposals for planning a review. Maya and the account executive are fictional. The example is not a reported customer result.

Keep personal and sensitive employee information in your organisation's approved systems.

The worksheet is a GTMA proposal, not a research-validated instrument. Fictional examples are illustrations, not evidence of results.