Promoted Friday, Managing on Monday

Idea In Short

Give new managers a working performance management method before they take responsibility for a team. Teach them to set clear objectives, keep evidence as work progresses, distinguish a person’s choices from the conditions around them, and hold timely conversations when performance changes. Then use shared training and assessment to make ratings more consistent across departments. Gallup reported that global manager engagement fell from 31% in 2022 to 22% in 2025. The Office of Personnel Management also reported that more than 98% of its employees received ratings of fully successful or better in fiscal year 2025. Those figures point to two different problems: the pressure managers face and the limited information an undifferentiated rating can provide. A review form cannot teach the judgment its users need.

Think back to the first time someone gave you a team. The promotion may have recognized strong work in an individual role, then quickly replaced that work with a new set of responsibilities. Managers must translate organizational priorities into expectations, help people make progress, and address gaps before they become entrenched. Yet many organizations leave new managers to learn these tasks by watching their own former supervisors or by filling in an annual review form. A form can collect ratings and comments, but it cannot teach someone how to set a useful objective or begin a difficult conversation.

The 98% problem

In December 2025, Scott Kupor, director of the U.S. Office of Personnel Management, described the agency’s fiscal year 2025 performance ratings. More than 98% of OPM employees received a rating of fully successful or better. The figures covered OPM employees, not the entire federal workforce. Even within that narrower scope, the distribution raises a practical question: how much can managers and employees learn from a rating that nearly everyone receives? 1

A rating system is meant to communicate a judgment. It can help employees understand how their work compares with expectations and can inform decisions about development, compensation, and promotion. When almost everyone receives a rating above the threshold, the rating alone cannot reveal much about differences in contribution. It also cannot explain whether the objectives were clear, whether the employee had the necessary support, or whether conditions changed during the year. Those details matter if the organization wants a review to guide the next period of work.

The problem is not solved by telling managers to be tougher. If objectives are vague, a low rating may reflect the manager's interpretation as much as the employee's performance. If the manager has not kept evidence, a rating may rest on recent events or general impressions. A higher rating can be just as unhelpful when no one can connect it to agreed results. Managers need practice gathering relevant evidence and applying common expectations before the form asks them to select a number.

The rating distribution also points to a system issue. A manager who has never learned how ratings are meant to distinguish performance may avoid a difficult conversation, especially if the organization offers no clear examples or review process. Over time, each department can develop a private scale. A "meets expectations" rating in one team may represent something different in another, making comparisons used for pay or promotion less reliable. Shared preparation gives managers a common basis for judgment, while leaving room to account for differences between roles.

Character or circumstance

When a report misses its deadline, a quick appraisal can turn the event into a judgment about the employee: careless, unreliable, or not capable. The fundamental attribution error describes the tendency to explain another person's behavior through their character before considering the situation. In performance reviews, that shortcut can obscure relevant facts. Perhaps the objective changed, a dependency arrived late, the employee lacked access to a resource, or the same expectation was understood differently by the manager and the person doing the work.

A trained manager begins with questions that test the conditions. Was the expected result clear? Did the employee have the authority, information, and tools needed to deliver it? Did priorities change after the objective was agreed? Has the gap happened repeatedly, or is

this a single event? The answers do not excuse poor work. They help distinguish a solvable process problem from a skill gap, a choice, or a pattern that needs a more direct response.

That distinction changes the conversation. If a manager finds that an employee lacked a key input, the next action may be to fix the dependency and agree a revised milestone. If the employee understood the goal but needs a skill, manager and employee can identify practice or coaching that addresses it. If expectations were clear, support was available, and the person repeatedly chose not to meet them, the manager can say so with specific evidence. In each case, the discussion is more useful than a label because it identifies what should happen next.

The order matters. Managers who start with a verdict often make it harder for employees to discuss context or correct a misunderstanding. Managers who ask first about the work and the conditions can still hold people accountable, but they have a stronger basis for doing so. This is not a script for avoiding judgment. It is a discipline for making judgment explainable and for matching the response to the cause of the gap.

A cycle that runs all year

Performance management works as a cycle of setting expectations, supporting progress, reviewing evidence, and adjusting plans. It is broader than the meeting held at the end of the year. The Chartered Institute of Personnel and Development describes it as a continuous process that connects objectives, feedback, learning, and accountability. Regular discussion gives managers and employees a chance to notice when work is on track and to raise problems while there is still time to respond. 2

The cycle begins with objectives that connect individual work to organizational priorities. A useful objective describes an outcome the employee can influence and gives both people a way to assess progress. “Improve customer experience” may express a worthwhile ambition, but it does not tell a team what result to deliver or when to review it. The manager and employee can clarify which part of the experience the role affects, what change would count as progress, and what evidence they will use. The objective should remain open to revision when priorities or operating conditions change.

Next, the manager and employee check progress in conversations that are short enough to happen regularly and specific enough to be useful. They can note completed work,

obstacles, decisions, and changes to the plan. The record need not become a diary of every task. It should preserve the context that will matter later: what was expected, what changed, what support was offered, and what the employee did in response. Timely notes help both people remember the year as it happened rather than reconstructing it from the last few weeks.

When performance begins to slip, the manager should address it when the pattern becomes visible. Waiting until the annual review can turn a manageable issue into a surprise and leaves little time to correct it. A direct conversation names the expected result, describes the evidence of the gap, invites the employee's account of the conditions, and agrees on a next step. The plan might involve removing a barrier, clarifying a priority, offering instruction, or setting a specific date to review progress. The employee should understand both the support available and the expectation that remains.

The appraisal then becomes a structured review of conversations and evidence already gathered. It should not be the first time an employee hears about a concern. The manager can compare agreed objectives with results, explain how changing conditions affected the work, and identify learning or development needed for the next cycle. A discussion about ratings should include the basis for the judgment and the expectations that will apply going forward. This keeps the appraisal connected to work rather than turning it into a form-filling ritual.

Managers can learn this cycle before a difficult case arrives. Practice scenarios can ask them to write a measurable objective, respond to a missed deadline, or prepare an improvement plan based on a specific performance gap. Managers can compare their approaches and discuss what evidence supports each judgment. That practice makes it easier to recognize where a conversation needs clarification, a change in support, or a firmer expectation. Organizations can use performance management training for managers as a structured starting point for those skills.

One standard across departments

When each manager learns performance management from a different predecessor, the organization risks building several incompatible systems inside one company. One department may interpret "exceeds expectations" as taking on extra work, while another may reserve it for results against defined targets. Even if each manager acts in good faith,

those differences can affect how employees are compared for compensation or promotion. A common syllabus can establish shared terms and decision principles so managers know what they are being asked to assess.

Consistency does not mean pretending every job has identical outputs. A customer-support role, a finance role, and a product role contribute in different ways. The organization can set a common standard for the quality of objectives, the use of evidence, and the way a manager explains a rating, while allowing measures to fit the work. Calibration discussions can then examine whether managers apply that standard consistently across different functions. They can also surface objectives that were too broad or expectations that changed midyear.

Training attendance shows that someone participated, but it does not establish whether they can apply the material. An assessment can ask managers to analyze a scenario, distinguish facts from assumptions, and select a response consistent with the organization’s process. A manager might demonstrate that skill through performance management certification assessed by examination. Any examination should test practical decisions the manager will actually make, not just recall of terminology.

The value of a shared standard depends on the organization’s follow-through. Human resources teams can review rating patterns, ask managers to explain unusual distributions, and check whether employees received clear objectives and timely feedback. Leaders should also make sure that managers have enough time and authority to perform the work expected of them. Training cannot compensate for conflicting priorities or a process that rewards inflated ratings. It can, however, give managers and reviewers a common method for noticing where the system needs attention.

The first Monday

Organizations already absorb the cost of unprepared managers in reviews that employees do not trust and performance gaps that remain unaddressed for months. The cost appears in work that is repeated, expectations that shift without discussion, and decisions that cannot be explained consistently. Not every problem comes from a manager’s lack of training, but a new manager should not have to discover the fundamentals through avoidable mistakes. The practical question is what a newly promoted person needs to do in the first month, not whether they can complete a review form at year-end.

Before the next promotion, define the minimum management practices the role requires. A new manager should be able to turn a priority into a clear objective, agree how progress will be observed, keep proportionate evidence, and raise a concern promptly. They should know how to ask about circumstances without losing sight of accountability. They should also understand when to involve human resources or another leader under the organization's policies. These actions provide a concrete basis for designing training and evaluating whether it prepared people for the job.

The organization can then give managers a shared method, time to practise, and a way to demonstrate what they learned. This preparation will not make every decision easy or eliminate differences in judgment. It can help ensure that employees hear expectations early, understand the evidence behind a review, and know what happens next. The 3 figures on manager engagement offer another reason to examine the support managers receive: the 2026 report found that global manager engagement fell from 31% in 2022 to 22% in 2025, while best-practice organizations reported 79% engagement among managers.

Promotion gives someone a team. Preparation gives that person a way to manage its performance. The Institute for Performance Management offers one example of a provider focused on this work, but each organization should decide what competence its managers need and how it will verify that competence. A useful next step is to compare the current manager onboarding process with the actions listed above, then close the most consequential gaps before another new manager takes over a team.

- 1Not managing performance
- 2Performance management: An introduction
- 3State of the global workplace 2026

Summary

Promotion changes the work before it changes the manager's experience. A newly appointed leader must clarify expectations, notice evidence, diagnose obstacles, and speak about performance while there is still time to respond. Organizations can make that work more consistent by teaching a shared method, practising difficult conversations, and assessing whether managers can apply the method to realistic situations. The annual

appraisal can then record a year of useful discussions instead of trying to reconstruct one from memory. Training does not remove judgment or guarantee fair outcomes. It gives managers a repeatable starting point and gives employees clearer expectations. Before the next promotion, decide what a new manager should be able to do in the first month, then make sure the training covers those actions.