



# CAREER PROGRESSING PERFORMANCE REVIEWS FOR LEGAL PROFESSIONALS



WHERE LAW FIRMS COME  
**TO RECRUIT LEGAL TALENT**

# For career-minded legal professionals, performance reviews are an essential part of working life-

Helping to identify training needs, opportunities for development, ensuring output and objectives are being met, and focus on the next steps and milestones on their career path.

Before we dive into the tactical side of performance reviews from your perspective as a legal professional, it's important to understand what a performance review is and why it often goes hand in hand with career planning. This will give you the foundation to use your review more effectively to drive your results, and sense check continually, your progress to the next steps in your legal career.

## What is a Performance Review?

A performance review is a two-way conversation between your direct manager and you about your:

- performance impact,
- results,
- development,
- and growth;

related to the objectives you were set as part of your onboarding and review process when you joined your firm or each year at annual appraisal time.

Depending on the size of your firm, it is often a key component of a wider performance management strategy.

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Traditionally, performance reviews have occurred once a year and have focused on evaluating past performance, although many businesses these days tend to have more regular meetings just to make sure everything is on track as you move through the year, and offer the chance for feedback, be that positive or developmental.

The reality is performance conversations can help you improve your performance when both you and your manager engage in the process.

So, let's look at the benefits of engaging with the performance review process.

## **How Performance Reviews Can Improve Your Performance**

Why are performance conversations important? Because they have a significant impact on your success and that of your company too.

Discussing performance isn't always easy. It may be tough for managers to give feedback, especially if that feedback isn't as positive as you would like – and more than likely, even harder for you to receive it. However, a performance review with both parties engaged in the process can make an enormous difference for all concerned.

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- It helps you review your objectives and goals – and progress against these.
- It is an opportunity to ask for help with any challenges you face should you need it
- It is an opportune time to get feedback on your work from your direct manager – both positive as well as constructive to help you improve and get even 'better' at what you do.

Knowing all the benefits a performance review can bring you as a respected legal professional in your organisation, how can you prepare?

## **How to Prepare for Your Performance Review**

It is worth noting at this juncture that not every line manager you work with will be perfect, especially when it comes to conducting a performance review (this in itself is a discipline that requires training, learning and refining).

The good news is management training has improved dramatically over the last few years, and most managers are better at what they do and are open to receiving feedback from their team on their performance too.

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Something to consider as you prepare; your manager is a human being. Today, we all are part of a workplace where everyone is expected to 'achieve' more because of our available resources.

Your manager is likely to be spinning multiple plates, of which running performance reviews is just one thing on their to-do list; remember they have performance objectives to achieve from their manager in the same way you do.

Come to the review process with the thought that we are all doing our best to achieve the success we all want, and you might be surprised how your performance review proceeds.  
In brief, preparation should:

## 1. Start With The End in Mind

Preparation and planning are the cornerstones of achieving an exceptional performance review.

The well-known leadership author Stephen Covey authored [The 7 Habits of Highly Effective People](#) – first published in 1989, but still popular today and well worth a read.. One of the habits he shared through his research of effective people was to decide what you want to achieve first and work back from there.

Let's say you are a solicitor who wants to become a partner within your firm. What will you need to demonstrate consistently over the next few months and longer to establish that you are the ideal person for the role?

Achieving your performance objectives will be your first starting point.

You may be reading this report from a different period of your own review process. The key thing to remember is to make sure you know what exceeding and achieving means when it comes to the objectives you have been set.

As an employee of your current company, you will have specific performance objectives to hit and values and behaviours to demonstrate.

The challenge for many people is that they take their objectives at face value without thinking through a plan to achieve or exceed the objectives they are set.

If you aren't sure of the detail around how to achieve something, talk to your manager, especially if you are new to an organisation.

It's the same when it comes to values and behaviours your company want to see you demonstrate.

Our values and our behaviours drive our actions which drive our results.

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For example, the following behaviours might be communicated within your law firm.

- Accountability
- Flexibility
- Transparency
- Proactivity
- Professionalism

It's important to understand how you can demonstrate and verbalise how you demonstrate these behaviours with examples if you can. ie how can you show you have acted proactively as part of your role, and how can you demonstrate professionalism?

## **2. The Devil is in The Data**

You have put in the demanding work of planning and prioritising what you need to do to hit your objectives. The next key step is to document evidence of what you are doing and the results you are achieving.

We tend to get diligent about tracking our wins when it's time to ask for a pay rise. Unfortunately, not everyone takes a disciplined approach to writing down their accomplishments throughout the year.

Start a list, and jot down things that you do well and are achieving as they happen. Be specific: Did you successfully win a new client, deliver an important presentation to senior partners, offer a helping hand when a co-worker was swamped, or get a record number of caseloads over the line?

Write it down now so that you don't have to scramble to find examples the night before your review.

## **3. Ask For Regular Catchups Ahead of Your Review**

In most roles, your line manager is not with you every second of your working day, or rather, monitoring your workload every second. If you do not have regular catchups where you are open about how everything is going in your legal role, they will not have the detail at the level you do.

You may or may not have regular catchups/mini-reviews with your manager. If regular reviews are not commonplace in your company, be bold and ask for interim conversations. They don't need to be a formal affair, though they will demonstrate your commitment to the role to your manager and to the wider business.

The beauty of interim conversations like this means that you consistently review past performance so that tweaks can be made and results are achieved. There is nothing worse than turning up to a review and discussing something you didn't understand or were annoyed about that happened eight months earlier.

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## 4. Be As Prepared As Your Manager

Depending on whether you have managed people yourself, a fact to be aware of is that your manager will appreciate the enthusiasm, honesty, and positivity you bring to the process.

Ask ahead of time for an agenda, the review time frames, and what will be discussed. If this is a more formal yearly review, you should expect and plan in time to prepare.

Your preparation ahead of time and the data you have collected can now be aligned to reviewing your objectives, behaviours, and future goals.

As a rule, your manager will take the lead and ask questions. Here are a few examples of questions they might use.

- What results from last month/quarter/year are you most proud of?
- How did you achieve X, Y or Z?
- What do you think you could improve on?
- What will you stop, start, and continue next month?
- Tell me more about what happened with A, B or C?
- What roadblocks are in your way?
- What impact has your performance had on the company?
- How can I support you as your manager?
- How have you demonstrate our firm's values of X, Y, and Z?

Many managers we work with as [legal recruitment specialists](#) will share their disappointment that team members don't answer the questions they have been set about their performance or avoid going into detail about their highlights, challenges and what has been happening for them in their role.

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## 5. Accept Feedback as a Gift

I know some people think there is irony in this phrase, yet the truth is how can we improve unless we are given both motivational and development feedback on how we perform, what we are doing well that we could do more of to get better?

Mastering the art of receiving feedback is one of the most important things you can do as a human being.

Receiving praise and recognition is fantastic, and hopefully, your review will have this as its main theme. However, as human beings, we live in a world where mistakes happen, and it is always a good idea to own yours and share them with your manager.

Ahead of your review, here is a suggestion to make your feedback session run well—document everything you want to share.

- What you are doing well and your standout achievements.
- Your challenges.
- What went wrong for which you were accountable.
- How could you improve in your role?
- Your development and training needs
- Ideas you have to improve your own and the companies results in the future

## 6. Ask Questions And Take Notes

Performance conversations should be two-way, so make sure you ask questions and take notes. When your manager makes suggestions on improvements you could make and what you are doing well, write them down.

When it comes to questions, I have listed a few that always work well below that will flow naturally throughout the conversation; if they don't, make sure you ask them at the end.

- What do you think were my highlights?
- What am I doing well, and where could I improve?
- What does the future hold for me here? Are there opportunities for growth and progression?
- What projects could I be involved with?
- What additional training do you think I need?

You may also wish to use the meeting to talk about about compensation, benefits and work flexibility. Whilst, as the name suggests, the meeting is designed to revolve around your 'performance' against your goals and objectives, you may also wish to ask yourself ahead of the date:

- Am I being underpaid for my current role or could the changes in the market mean I could earn more? Does my performance impact this?
- If I want to develop and grow, will my employer support these ambitions? Or, do I need to make a move?
- Realistically, I can deliver the objectives of my role working from home or in a hybrid role, so will my company be flexible?

All good questions to ask, which takes us back to the start of the report; decide what you want now.

We are in a unique hiring market at the moment, and as a high performing legal professional, you have many options open to you, which starts with a conversation with your manager.

As an experienced [legal recruiter](#), we ask all the candidates who come to us for career advice if they have discussed what they want with their current manager first. Performance reviews are as good a vehicle as any to have open, frank conversations about not only your performance, but also where this puts you on your career path more generally.

A recent article by [LifeLabs Learning](#) focuses on the 'paradigm shift' in the world of performance reviews, where the objective has moved from 'correction or reward' to a more holistic review of progress whilst also monitoring general engagement, putting career aspirations at the centre. Whilst they can be daunting, reviews should also be viewed as an opportunity to shine – highlighting your achievements and ways you have met or exceeded your objectives. They also give you the chance to look at the future, talk about your ambition, and those all important next steps.

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# Finally

It goes without saying that if conversations about your future career with your current employer are leaving you feeling a little underwhelmed, it may very well be the turning point to consider your options more widely.

Wherever you are in your career journey, it is a good idea to periodically analyse your current position depending on where you want to be. When you dig a little deeper, is everything on track and working out as you expected? Or do you need to make some changes in order to meet your goals?

To help you measure if your legal career is progressing as you envisaged when you started out, we recently created a [simple checklist](#) to provide you with a snapshot of whether you're on the right track.

And, if the results have prompted you to think harder about what your current role and company are providing you with, and perhaps made you realise that now is time for a change, then get in touch with [Clayton Legal](#) today. We can help you in deciding what step to take next to further your Legal career, and back on track with your own ambitions and goals.

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## CLAYTON LEGAL

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Clayton Legal has been partnering with law firms across the country since 1999 and during that time has built up an enviable reputation for trust and reliability.

We provide an experienced and credible voice in the market by being able to demonstrate a detailed knowledge of the legal sector's talent agenda. Talent is all about people and just like you, our consultants are true experts in their field with a real drive for excellence which informs everything they do.

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Trinity House  
88-96 Market Street West  
Preston  
PR1 2EU

T: 01772 259 121  
E: [enquiries@clayton-legal.co.uk](mailto:enquiries@clayton-legal.co.uk)  
W: [clayton-legal.co.uk](http://clayton-legal.co.uk)