

A series of white, overlapping geometric lines on a black background, creating a complex, abstract pattern of polygons and lines on the left side of the slide.

SBA MINI GUIDES 3 LENS PERFORMANCE REVIEWS

A step-by-step worksheet for effective, business-aligned performance conversations.

3 LENS PERFORMANCE REVIEWS

Traditional performance reviews often suffer from two extremes: being **too vague** to drive action or **too complex** to be useful.

This mini-guide offers a simpler, more strategic alternative.

The **3 Lens Model** helps managers and HR professionals evaluate performance in a way that's fair, clear, and tied to real business outcomes.

It focuses on:

- **Results** – What was achieved.
- **Behaviors** – How the work was done.
- **Growth** – What the person needs to focus on next.

Performance should be directly linked to team and organizational objectives.

This guide ensures reviews reflect actual contribution, not just effort or personality, while also helping managers clarify future expectations and development needs.

Keep it simple. Keep it focused. Make it matter.

STEP 1

ALIGN ROLE OBJECTIVES WITH ORGANISATIONAL GOALS

Objective: Ensure the individual’s goals directly support the priorities of their team, function, or business unit.

Food for thought:

- What is your team/function accountable for this quarter or year?
- How does this person’s work directly move those priorities forward?
- Are any of this person’s goals disconnected from current business needs?

TEAM OR DEPARTMENT PRIORITY	INDIVIDUAL’S SUPPORTING OBJECTIVE	WHY THIS OBJECTIVE MATTERS (IMPACT LINK)
<i>Example: Increase client retention by 15%</i>	<i>Improve onboarding success rate for new clients</i>	<i>Strong onboarding increases client engagement and lowers churn</i>

STEP 2

RESULTS LENS: WHAT WAS ACHIEVED

Objective: Assess the outcomes of the individual's work. Focus on value, not activity.

Food for thought:

- What changed because of this person's work?
- Did their results meet expectations, exceed them, or fall short?
- Are results being evaluated with the same standards across the team?

OBJECTIVE OR GOAL	KEY RESULT ACHIEVED	BUSINESS VALUE OR OUTCOME	PERFORPMANCE RATING
<i>Example: Improve onboarding experience for new clients</i>	<i>Reduced average onboarding time from 12 to 8 days and increased post-onboarding satisfaction scores by 22%</i>	<i>Early stage churn dropped by 11%, contributing directly to retention target</i>	<i>Exceeded expectations</i>

STEP 3

BEHAVIOUR LENS: HOW THE WORK WAS DONE

Objective: Evaluate the behaviors and mindset used to deliver the result - particularly those aligned with cultural values.

Food for thought:

- Did this person model behaviors that others should follow?
- Were there habits or tendencies that undermined results or team health?
- What feedback have peers or stakeholders provided about working with them?

KEY OBSERVED BEHAVIOURS	EFFECT ON TEAM, CULTURE, OR RESULTS	IS ADJUSTMENT OR REINFORCEMENT NEEDED?
<i>Example: Proactively collaborated with Sales and Product to streamline onboarding steps</i>	<i>Strengthened cross-functional alignment and improved handoff quality between departments</i>	<i>Reinforce – This collaboration model could be replicated in other client processes</i>

STEP 4

GROWTH LENS: WHAT COMES NEXT

Objective: Identify a focused development area that will build readiness for future performance or leadership.

Food for thought:

- If this person improved one thing, what would have the biggest impact?
- Is this related to a future role, a current limitation, or untapped potential?
- What support will help them move forward?

DEVELOPMENT FOCUS AREA	WHY IT IS IMPORTANT NOW	PLANNED ACTIONS OR RESOURCES
<i>Example: Influencing senior stakeholders to scale process changes beyond onboarding</i>	<i>The employee has strong ideas and results, but needs more influence at the senior level to scale improvements company-wide</i>	<i>Monthly mentoring with a senior leader + lead next Q's CX working group</i>

STEP 5

LOOKING AHEAD: Expectations for the next cycle

Objective: Set 2–3 key priorities for the next period that build on past work and contribute to broader business goals.

Food for thought:

- How will we know if this goal is met?
- What resources (people, time, training, tools) are needed to support success?
- Can this goal be revisited in regular check-ins before the next review?

NEXT PERIOD PRIORITIES	WHAT SUCCESS LOOKS LIKE	SUPPORT OR RESOURCES NEEDED
<p><i>Example:</i></p> <ul style="list-style-type: none"> • <i>Extend onboarding improvements to mid-tier enterprise clients</i> • <i>Lead knowledge-sharing initiative on onboarding best practices</i> 	<ul style="list-style-type: none"> • <i>80% of mid-tier clients onboarded in <10 days, satisfaction scores >90%</i> • <i>At least 3 internal workshops delivered, onboarding playbook updated</i> 	<ul style="list-style-type: none"> • <i>Project resources from CX Ops, time with regional managers</i> • <i>Communication support and visibility in Q2 all-hands</i>

MAKING THE MOST OUT OF THE 3 LENS PERFORMANCE REVIEW FRAMEWORK

The **3 Lens Performance Review** is designed to bring clarity, focus, and alignment to a process that is often over-complicated and disconnected from real business value.

Whether you're a manager, HR business partner, or executive leader, this framework can help you shift performance conversations from retrospective reporting to **forward-looking impact**.

HOW TO USE THIS FRAMEWORK EFFECTIVELY

- 1. Align every role with strategy.** Avoid the trap of activity-based reviews. Instead, ensure that each employee's priorities directly support team, functional, or company-level goals.
- 2. Keep it focused.** Limit objectives to what truly matters. Three well-chosen goals are far more effective than ten loosely defined ones.
- 3. Go beyond results: Evaluate the HOW.** Recognizing the way work gets done reinforces your company's cultural values. It also builds stronger teams and sustainable performance.
- 4. Personalize development.** Avoid boilerplate growth plans. One focused, relevant development area will create more impact than a list of vague training ideas.
- 5. Build review conversations, not checklists.** Use the worksheet to spark honest dialogue. Invite self-reflection, feedback, and shared commitment.

Ready to bring your company's
performance to the next level?

GET IN TOUCH TODAY!

Click the box to schedule a call, or send an email to
fabrizio@shibisset.com

3 LENS PERFORMANCE [SAMPLE]				
EMPLOYEE NAME	Jordan Chen		REVIEWER	Dana Li
ROLE	Client Experience Manager		TITLE	Client Experience Director
REVIEW PERIOD	Jan 1 – Jun 30, 2025		DATE OF REVIEW	July 15, 2025
ALIGNMENT WITH TEAM & BUSINESS GOALS				
TEAM / ORG PRIORITY	INDIVIDUAL OBJECTIVE		WHY IT MATTERS	
Increase client retention by 15%	Improve onboarding exp for new clients		Better onboarding reduces churn, a key retention lever	
Improve client satisfaction score by 10%	Launch post-onboarding support program for SMB clients		Ongoing support drives satisfaction, referrals, loyalty	
Strengthen client feedback loop	Design and pilot monthly Voice of Client report		Structured feedback helps drive product and service improvement	
LENS 1 RESULTS	OBJECTIVE	KEY RESULT	BUSINESS OUTCOME	RATING
	Improve onboarding	Reduced onboarding time (12 → 8 days); +22% satisfaction	11% drop in early churn	Exceeded expectations
	Post-onboarding support program	Rolled out to 3 regions, 80% participation, 94% helpfulness rating	CX score increased by 9% in SMB segment	Met expectations
	Voice of Client pilot	Designed & implemented monthly reporting process	Product and Ops adopted 3 client-driven improvements	Met expectations
LENS 2 BEHAVIOURS	KEY BEHAVIOURS		IMPACT	ACTION
	Proactive collaboration with Sales & Product		Improved onboarding consistency and feedback loops	Reinforce and scale across other CX initiatives
	Delegated ownership of pilot projects to team leads		Increased team confidence and cross-functional visibility	Continue coaching team on structured ownership
	Raised early concerns about client survey fatigue		Helped refine VoC design for higher response quality	Encourage continued insight-driven risk-spotting
LENS 3 GROWTH	DEVELOPMENT AREA		WHY NOW	DEVELOPMENT ACTIONS
	Influencing senior stakeholders		To scale onboarding and VoC success org-wide	Monthly mentoring + present Q3 results in leadership forum
PRIORITIES FOR NEXT CYCLE				
PRIORITY		SUCCESS CRITERIA	SUPPORT NEEDED	
Extend onboarding to mid-tier enterprise clients		80% onboarded in <10 days; >90% satisfaction	CX Ops resources + regional team alignment	
Formalise post-onboarding support playbook		Playbook approved and used across 5 regions	Content team support + pilot feedback loop	
CLOSING COMMENTS	MANAGER'S SUMMARY		EMPLOYEE'S COMMENTS	
	Jordan consistently delivers strong results aligned with business priorities. Ready to lead larger CX programs and expand strategic visibility.		Looking forward to expanding our CX tools across segments and continuing to coach the team towards scalable wins.	

NEED HELP?

WE ARE HERE TO HELP YOU.

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Stronger organizations | Smarter teams | Better results

We help build organizations where people perform at their best – so the business does too.