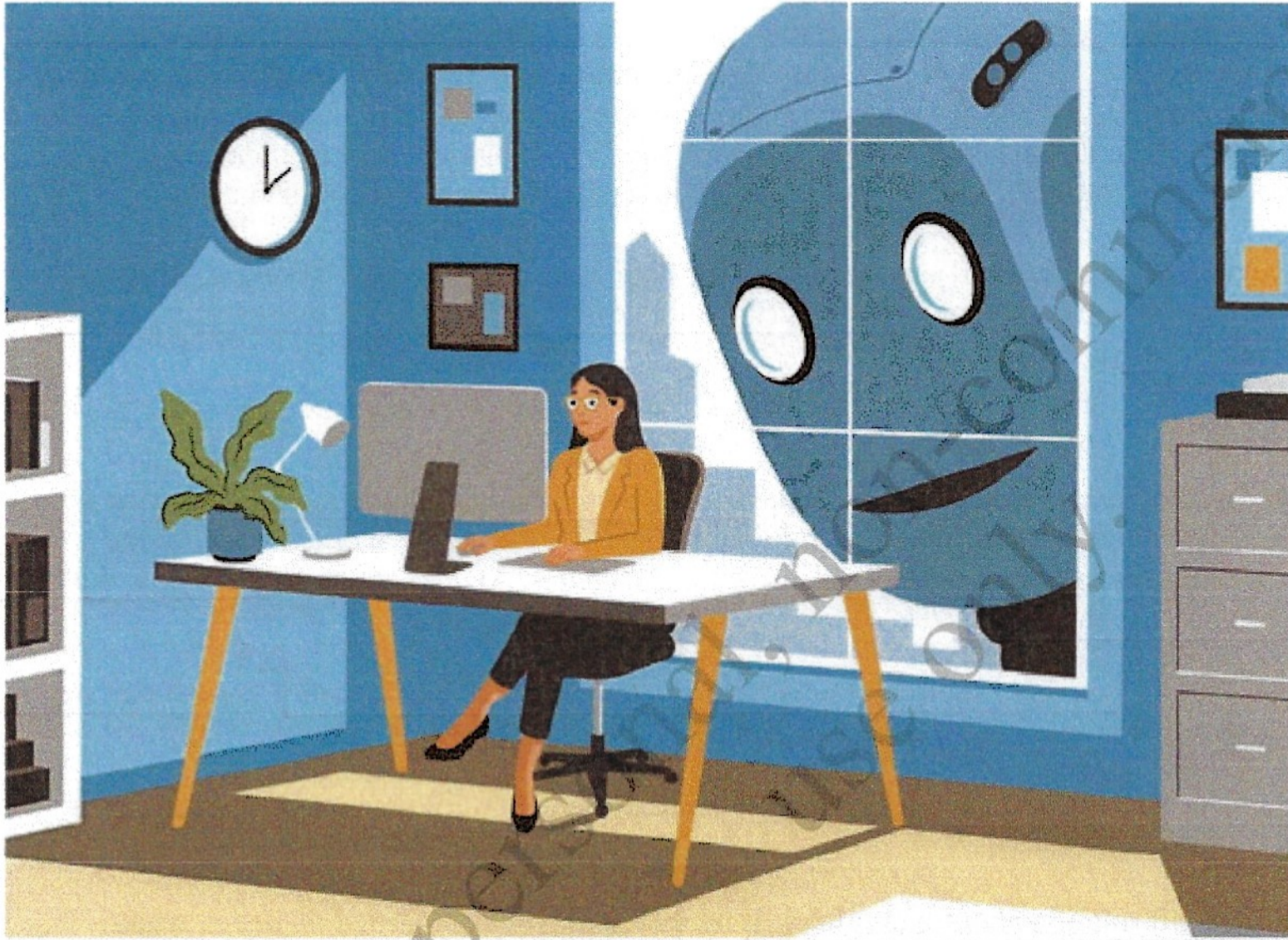


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## WSJ Print Edition



ELIOT WYATT FOR WSJ

### The Do's and Don'ts of Using AI To Write Performance Reviews

Artificial intelligence tools can be helpful in getting your message across. But they also could backfire.

BY CHERYL WINOKUR MUNK

**MANAGERS** are using AI to handle more of their paperwork, and that includes one of the most delicate parts of a boss's job: performance reviews.

But doing that can be risky. Yes, artificial intelligence can be useful for a review, such as helping managers express themselves more effectively so that employees better understand goals and next steps. But the technology can also make basic factual mistakes in reviews, expose sensitive information, exaggerate praise or criticism, or come off as generic and impersonal, undermining the boss's relationship with the employee.

"The tools are really effective when they are used to enhance the quality of the process," says Alex Alonso, chief knowledge officer of SHRM (formerly the Society for Human Resource Management), an HR lobbying group. But if managers rely too heavily on AI, he says, there is a danger of playing down or drowning out other legitimate feedback.

A recent study of nearly 2,000 members of SHRM found that 13% of organizations are using AI-powered tools in their performance-review processes. That figure doesn't include individuals who may use AI tools without the company's explicit permission.

Here are some do's and don'ts to remember when using AI for performance reviews:

**Check what the AI does**

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As is well-known, AI can screw up even the simplest facts, or just hallucinate and invent details, so it pays to check everything. If any of those goofs end up in a performance review, not only will the review be wrong, but it may erode employee trust and get a manager in trouble, says David Wagner, founder of Clear Mission Consulting in Portland, Maine.

Managers should also watch out for the tone the AI uses. It might make an employee's behavior sound overly positive, or more negative than intended, for example. Or the review may just sound generic, which could harm the employee's morale and relationship with the boss. "Employees have a radar for that," says Emily DeJeu, assistant teaching professor of business-management communication at Carnegie Mellon University's Tepper School of Business.

One smart strategy: Upload your draft of a review and ask the system for help improving clarity, making a particular section more succinct or softening the tone, for example. "AI is very good at offering suggestions for rewriting content that you've already produced," Wagner says.

### **Give the AI lots of facts to work with**

Whenever you ask AI to contribute to a performance review, make sure to be specific about the information you want the system to analyze or finesse. Kyle Elliott, an executive coach in Santa Barbara, Calif., has a client who put the company's business goals and the employee's accomplishments into AI and asked AI to connect them: How was the employee helping to, or failing to, advance those goals?

But for that strategy to work, Elliott says, you must spell out the details of an employee's performance and go into depth on the company's aims. AI needs that information to produce the deepest and most useful answers.

"AI's not going to know your goals or the business fully. You really have to provide a lot of data and information," Elliott says.

As part of that, remember to include information about intangibles: how the employee is regarded by peers, what attitude he or she brings to the job, how proactive he or she is about handling tasks. Those types of qualities won't necessarily show up in quantitative results that an AI can easily crunch, but they are vital to giving a full and fair assessment of an employee.

Last year, SHRM fielded a question about using AI to capture and analyze employees' email correspondence to help the company understand how they communicate outside of meetings, says Alonso.

The society's verdict? Don't do it. AI might weigh email communications too heavily, the pros feared, and lead managers to overlook other aspects of an employee's performance.

### **Use AI to practice the human touch**

Written performance reviews can be important, but there is often a conversational component to reviews. LLMs (large language models that understand and generate text) can help you hone that as well, says DeJeu.

Several paid platforms have voice-based options that allow managers to practice delivering feedback to a chatbot as if it were the employee. This allows managers to get tips on things like delivery, communication style and content.

AI can point out whether you're rambling or offering criticism without actionable advice, for example. "It makes you aware of things that you might not be aware of yourself," DeJeu says.

### **Avoid personal or sensitive information**

If managers use an external AI system instead of one that their company controls, they run the risk of sharing potentially sensitive data outside the company. That information also might be incorporated into an AI's knowledge base, where, in theory, it could be misused or exposed in a security breach.

So, when working on reviews, avoid sharing overly personal information with the AI. Even if you're using an employer's closed system, just don't copy and paste your notes. Employees might see it as a privacy violation if you use

information about their health designation, a difficult divorce or another sensitive matter, DeJeu says.

The same applies to proprietary company information. Elliott, the executive coach, has a client who entered the name of a confidential vendor into AI—a potential violation of company policy. The client's manager gave him a warning for having done so.

"It's actually wild. People share so much stuff with AI," Elliott says. *Cheryl Winokur Munk is a writer in New Jersey. She can be reached at [reports@wsj.com](mailto:reports@wsj.com).*

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