

EFFECTIVE PERFORMANCE DISCUSSIONS EMPLOYEE CHECKLIST

BEFORE

PREPARE

- Confirm date and time of your review with your supervisor
- Reflect on your performance in the past year
- Write a balanced self-assessment that summarizes accomplishments, strengths and areas for improvement
- Make a list of the key topics and questions you want to raise during the discussion
- Be prepared to share specific examples, ideas and recommendations
- Write your self-assessment in the review form and submit it before the deadline

CONSIDER

- Think about your career goals, important priorities for the coming year and the professional development opportunities that can help you achieve your goals
- Identify any feedback you want to share with your supervisor about how the two of you work together. Be sure to identify suggestions you can share to improve the relationship

COMMUNICATE

- Communicate with your supervisor before the discussion if you have any questions, concerns, or recommendations

DURING

KNOW WHAT TO EXPECT

- Keep your notes in front of you to ensure you cover the items important to you
- Be open to learning and understanding the feedback you receive
- Take notes to track key actions and ensure you understand expectations

CLARIFY

- Actively listen and ask questions throughout to make sure you understand
- Share your views and use specific examples to make your points
- Raise a red flag if you have concerns or disagree
- Be honest and communicate your issues, be willing to work through any difficult issues, and maintain a positive focus
- Share feedback and suggestions for how you and your supervisor can improve your working relationship

FOCUS ON THE FUTURE

- Make sure you discuss goals for the coming year and prioritize areas of focus while referencing the Goal Agreement
- Provide your supervisor information about your career goals and explore ideas that will help you progress
- At the end of the meeting, schedule a performance checkpoint with your supervisor to revisit goals, priorities and progress

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AFTER

REVIEW

- Review your notes to make sure you understand what is expected of you
- If you have any questions or concerns follow-up with your supervisor

SEEK REGULAR FEEDBACK

- Initiate regular (e.g., quarterly) checkpoints with your supervisor to revisit goals, priorities and progress. It's in your best interest to be proactive
- Continue the conversation - if new challenges or obstacles are interfering with achieving your goals, share those challenges with your supervisor
- Reflect regularly on your performance and progress. Seek input from others such as co-workers and customers

STAY ON TRACK

- Take control of your career by regularly reviewing what is important to you
- Keep asking yourself if you are taking actions that will improve your performance and help you learn and develop