

BEFORE

Schedule

- Confirm dates/times for all staff discussions
- Secure a private, interruption-free location
- Allow for 45-60 minutes minimum

Communicate

- Send calendar invites to staff in advance
- Provide location (in-person if possible)
- Share a brief agenda to clarify expectations
- Communicate your expectations that your staff complete their self assessments on time so their perspectives are part of the review.
- Encourage the employee to prepare by using the Employee Checklist
- Ask your team to read their reviews in advance, and to come prepared with questions and thoughts on their professional development and growth

Prepare

- Create an outline for your discussion
- Review job description and any available prior performance reviews
- Come prepared to discuss priorities for the upcoming performance year
- Share feedback and kudos you've received about your employee
- Reference specific examples to illustrate points
- Talk with your manager and/or your HR Business Partner if you anticipate problems or need coaching

DURING

Set the tone

- Create a positive atmosphere in which open and honest discussion is welcome
- Review the purpose of the meeting and ask the employee if other topics should be included

Listen

- Encourage the employee to participate by asking open ended questions; avoid dominating the conversation
- Invite the employee to ask questions, raise issues or concerns and give you feedback
- Paraphrase and summarize what you hear

Look Back

- 25-35% of discussion should focus on the past
- Review overall rating, achievement of goals, and answers to two manager questions
- Recognize significant accomplishments and contributions

Coach

- Provide meaningful recommendations
- Phrase feedback constructively

Look Ahead

- 65-75% of discussion should focus on priorities and goals for the year ahead
- Discuss employee thoughts on growth
- Close by asking for feedback on what you can do differently to support the employee

AFTER

Document

- Note the employee's feedback about your performance/support
- Track your commitments and follow through on agreements

Follow Up

- At the midpoint check-in, touch base on improvements and changes
- Provide timely feedback, don't wait for the midpoint – deliver praise and constructive feedback in the moment
- Conduct "stay interviews" to discuss your team's engagement and thoughts on career paths/growth

Ask

- Check in with the employee at regular 1:1s, ask them to track their goal progress and encourage them to seek feedback
- Regularly encourage feedback from the employee about how you can provide support

Act

- Recognize and reward successes — big and small (in public or privately, depending on employee preference)
- If progress on goals and development areas is slow or off track, revisit, revise or counsel the employee immediately — it's your job
- Seek assistance from your supervisor and/or HR Business Partner if you have performance concerns