

## GETTING READY FOR A PERFORMANCE CHECKPOINT FOR EMPLOYEES

It's time for you and your manager to discuss what you've accomplished during the review period and what you plan to do for the remainder of the time. This discussion should summarize accomplishments to date, identify any goals that were added, eliminated or changed, review priorities, and clarify performance expectations going forward. The Checkpoint is also an opportunity to focus on your Professional Development Plans.

### EMPLOYEE GUIDELINES

#### PREPARE A LIST OF WHAT YOU WANT TO COVER

- Provide your manager with current information on your accomplishments starting from when goals/priorities were set.
- Prepare for the discussion—outline a list of your significant accomplishments, what you've learned, and what you intend to focus on in the future.

#### MEET AND DISCUSS PERFORMANCE TO DATE

- Ask for feedback from your manager on what you are doing particularly well and what you might improve upon.
- Reflect on your goals/priorities as well as the performance factors that are critical to your success. Provide your manager with specific examples of what you've done particularly well and where you would like to improve.
- Make the discussion easier by asking questions like, "What else can I do to be more effective?" or "Do you have any suggestions for me?" Then listen carefully.

#### DISCUSS WHAT YOU PLAN TO ACHIEVE BY THE END OF THE PERFORMANCE CYCLE AND CLARIFY EXPECTATIONS

- Make sure you get all the information you need by making sure your goals are SMART(er) or that your top priorities are clear. Make sure you do not walk away unsure of what is expected. Ask questions to get the clarity that you need.
- Make your manager aware of any issues or roadblocks you are facing and discuss how they might be overcome. Let your manager know what you need from him/her to be successful.

#### DISCUSS YOUR DEVELOPMENT ACTIVITIES FOR THE YEAR

- Share progress you have made toward your professional development plan and discuss what you will do to continue to develop.
- Ask for coaching and find out how your manager can support you in accomplishing your professional development plan. Make specific suggestions and ask for the help you need.

#### COMPLETE THE DISCUSSION

- Express appreciation for the feedback.

## GETTING READY FOR THE PERFORMANCE CHECKPOINT FOR MANAGERS

It's time for you and your employees to discuss their accomplishments during the review period and what they plan to do for the remainder of the time. This discussion should summarize accomplishments to date, identify any goals that were added, eliminated or changed, review priorities, and clarify performance expectations going forward. The Checkpoint is also an opportunity to focus on their Professional Development Plans.

### MANAGER GUIDELINES

#### SCHEDULE A MEETING

- Ask your employees to come prepared to discuss accomplishments, priorities, and progress on professional development plans.
- Plan for a minimum of one hour. And once scheduled, avoid moving or cancelling the discussion. Demonstrate that you think the Checkpoint is a priority.

#### PREPARE FOR THE PERFORMANCE CHECKPOINT

- Review your files of what has been accomplished to date. It helps to maintain an updated file for each of your direct reports. Track feedback and recognition received from all relevant people.

#### MEET AND DISCUSS PERFORMANCE TO DATE

- Share with the employee your view of the progress made on goals/priorities and be clear about what goals/priorities you'd like them to focus on for the rest of the performance cycle.
- Provide specific, behavioral examples of what the employee is doing particularly well, and examples of anything that could be done differently to be more successful.
- Ask the employee how the job is going. Questions like "What's going well?" and "What needs to be improved?" can foster a productive conversation about the work and their performance.

#### DISCUSS YOUR EXPECTATIONS — AND THE EMPLOYEE'S EXPECTATIONS — ABOUT WHAT SHOULD BE ACCOMPLISHED BY THE END OF THE REVIEW PERIOD

- Agree on what goals/priorities are most important for the remainder of the performance cycle.
- Ensure a shared understanding of performance expectations to minimize unpleasant surprises at the end of the performance review.
- Explore any challenges or roadblocks the employee is concerned about. Ask how you can help eliminate roadblocks and then follow through.
- Review progress on the employee's professional development plan and discuss what you can do to support their development. Ask about long-term career aspirations.

#### COMPLETE THE DISCUSSION

- Thank the employee for their hard work and tailor your comments to motivate the employee.
- Agree on any follow up action items and set a date for a future Checkpoint.
- Document the discussion and give a copy to the employee.