

# Performance Review Managers Checklist

Make performance discussions as productive as possible to  
Get the Right Results



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# Overview

Performance discussions can make people defensive; therefore preparation for a performance discussion is critical for both a manager and their team member to better deal with this challenge.

Using a structure is a great way to prepare for these discussions.

The key focus should be on performance achievement against the performance objectives – keep your emotions and feelings out of it.

## I. Prepare for Formal Review



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# Prepare For Formal Review

## Make performance discussions as productive as possible

- Make sure that enough time is available to complete the process thoughtfully and uninterrupted
- Carefully recall and consider examples of each team members performance against each Org. value
- Reflect on relevant data and issues for discussion
- Stay on topic
- Focus on the facts not your beliefs and assumptions
- Key Strengths and Areas for Development
- Ask relevant questions

## 2. Review Checklist for Manager



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# Checklist

Focuses on strategies, opportunities and plans for improvement.

- How clear are you on the company process and policy?
- Are you prepared to convey these to the employee?
- Do you know exactly what this person does at work?
- Have you reviewed the written performance documentation (Scorecard, Job Performance, Behaviors, Values?)
- What are the key issues? Be prepared.
- How have previous meetings of this type gone with this particular person?
- List the steps you are going to suggest for improvement. Be specific, include action, timeframe and responsibility. Don't Wing it because it'll come through in your communication, both verbal and in your body language.

## 3. Outcomes



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# Outcomes

Always start with the end in mind and reverse engineer from there.



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# Outcome Questions

What outcome do you want to achieve from this review?

- What needs to be accomplished during the meeting? Be specific.
- Are you prepared to explain the results and ratings? Chances are you may have to.
- Which key result areas will you highlight (strengths and weaknesses)?
- What developmental goals and plans will you put forward?

## 4. Your Approach



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# Approach

- What type of reaction do you think the person might experience during this review? Knowing your people deeply matters.
- How will you respond? Knowing YOURSELF deeply matters even more.
- What questions are you going to ask to help the employee understand the results and ratings? Make them inductive... Relevant....With volition.
- How will you test and develop the employee's insights and understanding of the results? Remember, we all hear and interpret things differently. We humans are meaning making machines.
- What questions will you ask to develop your own understanding of the employee's interpretation of the results?
- How will you know if there is a commitment to the development goals and plan you have worked out during the meeting?

## 5. The Follow Up



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# The Follow Up

This shows your team members you care and that they matter



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# Follow up

- What opportunities (training and development) will you provide? Giving feedback without a plan to develop is useless.
- What resources are available (instruction or supervision) that you can provide? If you don't provide the right resources to help your people develop, then why should they even care to improve and develop?
- What personal support (further meetings, coaching or mentoring) will you provide?
- Describe the follow-up regime you intend to suggest. Be specific and include timelines, people and resources.
- How will you recognise and reward positive changes, especially if they occur immediately after the review?



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