

The Ultimate Performance Management Checklist

How to Plan, Conduct, and Follow-up a Mutually Beneficial Employee Review

Before Review

- ☐ Define job duties and priorities
- ☐ Set performance standards and measurable goals
- ☐ Collect and review applicable performance data
- ☐ Review notes from weekly one-on-one meetings
- ☐ Review past performance reviews
- ☐ Solicit broader feedback from:
 - Co-workers
 - Subordinates
 - Managers and company leaders
 - Customers/clients
- ☐ Schedule review meeting in a neutral meeting room
- ☐ Send employee self-assessment
- ☐ Review employee's self-review
- ☐ Develop an action plan
 - Current performance
 - Ways to improve
 - Potential development
- ☐ Prepare meeting agenda with key talking points

After Review

- ☐ Follow up with performance feedback regularly
- ☐ Use development/improvement plan as a guide during weekly one-on-one meetings
- ☐ Provide resolution, if any, to those who provided feedback
- ☐ Forward appropriate documentation to HR
 - Retain a copy for personal referral

During Review

- ☐ Create a comfortable, private meeting space
- ☐ Maintain a positive and constructive environment
- ☐ Discuss objective and agenda of the meeting
- ☐ Have employee discuss performance and achievements
- ☐ Manager-led discussion on performance
 - Include both constructive and positive feedback
- ☐ Discuss broader feedback from co-workers, customers, and management
- ☐ Have employee discuss development
- ☐ Manager-led discussion on development
- ☐ Discuss performance plan moving forward
 - Satisfactory or better performance = establish a development plan
 - Less than satisfactory performance = establish an improvement plan
 - Set clearly defined benchmarks
- ☐ Set new goals in support of department objectives and the organization's overall business plan
- ☐ Mutually sign agreed upon performance plan
- ☐ Leave time for anything additional discussions or questions
- ☐ Set a timeframe for formal follow-up
 - Weekly check-ins
 - Next performance review (ideally quarterly, at least 2x a year)
- ☐ End the meeting in a positive and supportive manner
 - Reiterate takeaways and action items
 - Express confidence in the proposed plan and employee's ability
 - Reaffirm support and assistance