



Checklist

Performance Review

To provide greater guidance for performance reviews or in some cases, more informal feedback discussions, we've included the checklist below. This list is designed to serve as a starting point as you seek to lead a constructive and productive discussion of your direct report's performance and any follow up steps.

List of Preparation Steps:

ACTIVITY	COMPLETED?
1) Have I required that my direct reports provide me with a self-review so I can identify and plan for areas of possible disagreement during the review?	
2) Have I requested feedback for my direct reports from other sources (e.g., peers, internal customers) to ensure I have a complete picture of their performance?	
3) Have I identified performance strengths and examples that demonstrate these strengths?	
4) Have I pinpointed the one or two areas of performance weakness that I will address in this review?	
5) Have I identified concrete examples that demonstrate the impact of these performance weaknesses?	
6) Have I identified possible action steps that the employee and I can take to help close any development gaps?	
7) Have I created an outline of talking points where the bulk of the review is on strengths, and any weaknesses are put into context?	
8) Have I ensured that I have a plan for next steps (e.g., timeline for creating a development plan)?	
9) Have I clearly identified performance expectations for the next review cycle or set up a time to discuss them in the near future?	