

Checklist for Performance Reviews

The following is a checklist of actions you can take to make performance reviews relevant and get the results you want. A performance review process should focus on goals, good feedback, coaching for next level of performance and clear understanding of Creative Landscape's expectations.

Before the Performance Review:

☐ **Understand Why:** Why are you reviewing the employee? That might seem obvious but really isn't. It should be all about development and providing clear expectations for next level performance...not about determining compensation and identifying all areas of weakness.

☐ **Prepare:** Never do a performance review on the fly. Take time to fill out the form honestly and with specific examples of good performance and not so good performance. Never be general; feedback both positive and negative needs to be specific with examples. Capture major accomplishments and focus on outcomes not just effort.

- Gather feedback from others
- Have documentation if possible

☐ **Give Notice and Outline Expectations:** Give employees plenty of notice and let them know what to expect. Ask them to come prepared with their self assessment and most importantly to be prepared to discuss their strengths, what they want from the job in the future, and what skills they want to develop.

During the Performance Review:

☐ **Set up:** Let them know this is all about them and is designed to identify strengths and build a plan to help them advance in the company.

☐ **Link to Job Description:** The review should link to the behavioral characteristics and skills/tasks outlined in the job description. It should be an accurate reflection of how well they are performing against the JD's specifications and be complete, consistent, fair and objective.

☐ **To Do's:**

- Keep it Conversational; ask employees what they are most proud of and where they most want to grow. Use their input to guide your discussion.
- Keep it casual: Decide where to have the review...make sure it is quiet, uninterrupted and confidential.
- Keep it collaborative: It is their performance, not yours. They need to be accountable first and you need to be supportive in providing what they need to grow and improve.
- Do not be argumentative...always focus on facts and examples, never on personality or person
- Get employee talking...50/50 is a good mix.
- Don't tell. **Ask open ended questions** - who, what, when, where and how and avoid yes or no questions.
- **Listen, really listen** -you learn a lot and employee really feels like this is serious; **don't rush**

☐ **Summarize First:** Provide a quick overview...say, we will review each of the areas but your strengths are...**at least three**... and development areas are...**no more than 2**.

☐ **Spend Time on Next Steps:** Spend as much time on goals, development plans, career path and next steps as reviewing past performance.

☐ **End on a Positive:** Have employee sign the review, let them know they will get a copy and end on the positive...thanks for your input and I look forward to helping get to the next level.

After the Review:

☐ **Follow-up, Follow-up, Follow-up:** Look for opportunities to regularly reinforce strengths and any improvements in behavior or skills. If you committed to providing training opportunities or other development options, **MAKE SURE YOU PROVIDE THEM**. Do what you said you would do.

☐ **Start 90 Day Mini-reviews:** Once a year performance reviews are useless without regular feedback and reinforcement.