

EFFECTIVE PERFORMANCE DISCUSSIONS

EMPLOYEE CHECKLIST

Use the following guidelines to prepare and conduct an effective performance discussion. Follow up with key actions to ensure that ongoing conversations occur throughout the next performance cycle.

BEFORE:	DURING:	AFTER:
<p>PREPARE</p> <ul style="list-style-type: none"> <input type="checkbox"/> Confirm date and time of your review with your manager. <input type="checkbox"/> Gather data and reflect on your performance in the past cycle. <input type="checkbox"/> Review the tips sheet and job aid for completing the self-appraisal section of the appraisal form. <input type="checkbox"/> Write a balanced self-appraisal that summarizes key accomplishments, professional development and feedback for your manager. <input type="checkbox"/> Submit the performance appraisal form to your manager for review before the discussion. <p>CONSIDER</p> <ul style="list-style-type: none"> <input type="checkbox"/> List the key topics and questions you want to cover during the discussion. <input type="checkbox"/> Think about your career goals, important priorities for the coming year and the professional development opportunities that can help you achieve your goals. <input type="checkbox"/> Identify any feedback and suggestions you want to share with your manager about how you work together. <p>COMMUNICATE</p> <ul style="list-style-type: none"> <input type="checkbox"/> Communicate with your manager before the discussion if you have any questions, concerns, or recommendations. 	<p>COMMIT TO BE FULLY PRESENT</p> <ul style="list-style-type: none"> <input type="checkbox"/> Hold space on your calendar before the discussion so you are not rushed, and remove distractions. <input type="checkbox"/> Keep your notes in front of you to ensure you cover the items important to you. <input type="checkbox"/> Be open to learning and understanding the feedback you receive. <p>CLARIFY</p> <ul style="list-style-type: none"> <input type="checkbox"/> Actively listen and ask questions throughout to make sure you understand expectations. <input type="checkbox"/> Share your views and use specific examples to make your points. <input type="checkbox"/> Be honest and communicate any concerns and be willing to work through any difficult issues while maintaining a positive focus. <input type="checkbox"/> Share feedback and suggestions for how you and your manager can improve your working relationship. <p>FOCUS ON THE FUTURE</p> <ul style="list-style-type: none"> <input type="checkbox"/> Discuss your career goals and explore professional development ideas that will help you grow. <input type="checkbox"/> Identify activities that could become performance and/or professional development goals. 	<p>REVIEW</p> <ul style="list-style-type: none"> <input type="checkbox"/> Complete any edits to the form that were agreed to in the discussion. <input type="checkbox"/> E-sign the form and submit it to your manager before the deadline. <input type="checkbox"/> Review your notes to make sure you understand what is expected of you. <input type="checkbox"/> If you have any questions or concerns, follow up with your manager if you have any questions or concerns. <p>SEEK REGULAR FEEDBACK</p> <p>Continue the conversation– include goal progress updates in regular check-in meetings, especially if new challenges or obstacles arise.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Reflect regularly on your performance and progress. Seek input from others such as co-workers and customers. <input type="checkbox"/> Ensure that the mid-point goal discussion takes place, as planned. <p>STAY ON TRACK</p> <ul style="list-style-type: none"> <input type="checkbox"/> Take control of your career by regularly reviewing what is important to you. <input type="checkbox"/> Keep asking yourself if you are taking actions that will improve your performance and help you learn and develop.

