

EFFECTIVE PERFORMANCE DISCUSSIONS

MANAGER 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>SCHEDULE</p> <ul style="list-style-type: none"> <input type="checkbox"/> Confirm dates/times for performance discussions. <input type="checkbox"/> Secure a private, interruption-free location. <input type="checkbox"/> Allow for 45-60 minutes per employee. <p>COMMUNICATE</p> <ul style="list-style-type: none"> <input type="checkbox"/> Share a brief agenda to clarify expectations and submission deadlines. <input type="checkbox"/> Encourage the employee to prepare by completing the Effective Performance Discussion–Employee Checklist. <input type="checkbox"/> Provide the written review in advance to avoid the discussion time being dominated by the employee reading the review. <p>PREPARE</p> <ul style="list-style-type: none"> <input type="checkbox"/> Review last year’s performance review and job description. <input type="checkbox"/> Review the employee’s self-appraisal. <input type="checkbox"/> Identify critical discussion points for each section of the review. <input type="checkbox"/> Choose specific examples of behavior and performance that support assessment. <input type="checkbox"/> Talk with your supervisor or your HR Director if you anticipate problems or need coaching. 	<p>SET THE TONE</p> <ul style="list-style-type: none"> <input type="checkbox"/> Create a positive atmosphere that encourages an open and honest discussion. <input type="checkbox"/> Review the purpose of the meeting and clarify any initial employee concerns or questions. <p>LISTEN</p> <ul style="list-style-type: none"> <input type="checkbox"/> Encourage the employee to participate by asking open-ended questions; avoid dominating the conversation. <input type="checkbox"/> Invite the employee to ask questions, raise issues or concerns and give your feedback. <input type="checkbox"/> Paraphrase and summarize what you hear. <p>LOOK BACK</p> <ul style="list-style-type: none"> <input type="checkbox"/> 50% of discussion should focus on the past. <input type="checkbox"/> Review overall rating, achievement of goals and assessment of performance against expectations. <input type="checkbox"/> Recognize significant accomplishments and contributions. <p>COACH</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide meaningful recommendations. <input type="checkbox"/> Phrase feedback constructively. <p>LOOK AHEAD</p> <ul style="list-style-type: none"> <input type="checkbox"/> 50% of discussion should focus on the year ahead. <input type="checkbox"/> Discuss priorities for the employee’s professional development. <input type="checkbox"/> Use performance feedback to discuss what success looks like going forward. <input type="checkbox"/> Close by asking for feedback on what you can do differently to support the employee. 	<p>DOCUMENT</p> <ul style="list-style-type: none"> <input type="checkbox"/> Follow up with any edits to the form, as agreed to in the meeting. <input type="checkbox"/> Return the form for employee signature. <input type="checkbox"/> E-sign and submit the form by the deadline. <p>ONGOING FOLLOW UP</p> <ul style="list-style-type: none"> <input type="checkbox"/> Schedule a mid-year goal check-in meeting immediately after the discussion. <input type="checkbox"/> Revisit established goals and development areas on a regular basis both formally and informally. <input type="checkbox"/> Provide timely feedback. Deliver praise and constructive feedback in the moment. <input type="checkbox"/> Regularly encourage feedback from the employee about how you can provide support. <input type="checkbox"/> If progress on goals and development areas is slow or off track, revisit, revise or counsel the employee. <input type="checkbox"/> If performance drops between May-June, after the performance assessment and no longer aligns with the rating given, seek out assistance from the HR Director on steps to address the employee’s merit raise. <input type="checkbox"/> Seek assistance from your supervisor and/or HR Partner if you have performance concerns.