

Performance Review Checklist

A checklist for preparing, conducting, and following up on a performance review meeting.

Prepare for the Review

- Review the employee's goals from the previous cycle
 - Gather specific examples of work and outcomes
 - Collect peer or stakeholder feedback if used
 - Note key strengths and clear growth areas
 - Draft an agenda and main talking points
 - Send the employee the agenda and a self-review prompt
- Advance notice leads to a richer conversation.

Set Up the Meeting

- Schedule enough uninterrupted time for the discussion
 - Book a private, comfortable space or video room
 - Confirm the time and format with the employee
 - Have notes, examples, and the form ready to reference
 - Silence notifications and remove distractions
 - Plan an open, calm tone for the conversation
- Your demeanor sets the tone for honesty.

Open the Conversation

- Start by putting the employee at ease
- Explain the purpose and flow of the meeting
- Invite the employee to share their self-assessment first
- Acknowledge their overall contributions early
- Confirm this is a two-way discussion, not a lecture
- Listen actively before offering your view

Discuss Performance

- Review achievements against the agreed goals
 - Use specific examples for both wins and gaps
 - Balance recognition with honest growth feedback
 - Discuss challenges and what support is needed
 - Keep feedback focused on behavior and outcomes
- Describe actions, not personality.
- Ask questions and check the employee's understanding

Agree on Next Steps

- Set clear, measurable goals for the next cycle
- Agree on development actions and resources
- Clarify expectations and how success will be measured
- Discuss career aspirations and growth paths
- Confirm any commitments you are making as a manager

- End on a forward-looking, encouraging note
Leave the employee motivated, not deflated.

Follow Up After the Meeting

- Document the discussion and agreed goals promptly
- Share written notes with the employee for alignment
- File the completed review per your HR process
- Schedule follow-up check-ins to track progress
- Act on the support and commitments you promised
- Reflect on the conversation to improve future reviews
Consistent follow-through builds trust over time.