Performance Review Checklist for Managers

tick HR
S O L U T I O N S

To ensure a comprehensive and effective performance review process, use this checklist as your guide. This will help you provide balanced feedback, stay compliant, and foster positive relationships with your employees.

Gather Documentation

- ✓ Collect performance data, metrics, and relevant documents.
- ✓ Review previous performance reviews and goals set for the year.
- ✓ Gather feedback from colleagues, clients, and other relevant sources.

Prepare Your Feedback

- ✓ Identify key achievements and areas for improvement.
- ✓ Prepare specific examples to illustrate your points.
- ✓ Develop clear, actionable goals for the future.

Understand Company Policies

- ✓ Review your organisation's performance review policies and guidelines.
- ✓ Ensure you are familiar with legal requirements and compliance issues.

Schedule the Review

- ✓ Set up a meeting time that works for both you and the employee.
- ✓ Ensure the meeting is private and free from interruptions.

During the Review

Create a Positive Environment

- ✓ Start with a friendly greeting and set a collaborative tone.
- ✓ Clearly explain the purpose and structure of the review.

Discuss Performance

- ✓ Provide balanced feedback, starting with positive achievements.
- ✓ Address areas needing improvement with specific examples.
- ✓ Avoid vague statements; be clear and concise.

Engage in Two-Way Communication

- ✓ Encourage the employee to share their self-assessment and feedback.
- ✓ Listen actively and acknowledge their perspective.
- ✓ Discuss any challenges they faced and how they overcame them.

Set Future Goals

- ✓ Collaboratively set SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals.
- ✓ Outline clear expectations and timelines.
- ✓ Discuss development opportunities and resources available for skill improvement.

Document the Review

- ✓ Take detailed notes during the review.
- ✓ Ensure both you and the employee sign off on the review document.
- ✓ Save the review in the employee's personnel file.

After the Review

Follow Up

- ✓ Schedule regular check-ins to discuss progress on goals.
- ✓ Provide ongoing support and resources as needed.
- ✓ Address any follow-up items or concerns promptly.

Reflect on the Process

- ✓ Evaluate the effectiveness of the review process.
- ✓ Seek feedback from the employee about their experience.
- ✓ Identify areas for improvement in your approach to future reviews.

Maintain Continuous Communication

- ✓ Keep an open line of communication with your employees.
- ✓ Recognise and reward achievements throughout the year.
- ✓ Provide constructive feedback regularly, not just during formal reviews.

By following this checklist, you can ensure a fair, effective, and productive performance review process that benefits both your employees and your organisation.