

Performance Review - Conversation Outline

1. Prepare for the conversation

- Complete forms/paperwork as appropriate for the employees you supervise
- Tell the employee what you need them to complete for the meeting, (Self-evaluation, any documentation they have to share, comments on goals)
- Ask the employee for information about preferences. (receive form in advance, location of meeting).

2. Establish the proper climate.

- Schedule the meeting in advance and stick to it.
- Locate a private space and guard against interruptions.
- Create a sincere, open, and constructive atmosphere.
- Allow enough time to discuss the review.



3. Create a shared conversation.

- Listen and ask for the employee's opinion.
- Pay attention to body language that might send the wrong cues
- Try to understand your employee's point of view. Working together is better than being at odds.
- Be willing to modify the performance review form to reflect what is discussed and agreed upon at the meeting if warranted.

4. Discuss areas of success and challenges for the performance review period.

- Review goals, success criteria, and/or priorities set.
- Discuss obstacles and roadblocks that affected performance achievement.
- Discuss projects that might continue in the coming year.
- Allow the employee to ask questions give input

5. Review the ratings given on the performance review form.

- Be clear about how you think about the ratings.
- Be willing to explain any of your decisions on ratings.
- Be willing to hear the employee's input.
- Be clear what an employee would need to do to get a higher score if asked.

6. Discuss plans for growth and development

- Discuss the employee's developmental and career goals for the coming year.
- Explore ways there may be opportunities for growth and development within the current role.
- If performance issues exist, discuss plans for improvement.

7. Wrap-up and Next Steps

- Give time for the employee to ask any additional questions.
- Offer opportunity to discuss further if necessary.
- Clarify next steps on the paper work completion.
- Share how priorities and/or goals will be formed for the coming year.