

Performance reviews should do more than evaluate past performance, they should clarify expectations, support employee development, and strengthen retention.

Use this toolkit to prepare for meaningful, productive review conversations.

Performance Review Preparation Checklist For Managers

Before conducting a review, prepare with the following:

- Gather performance examples from the review period
- Review established goals, objectives, and expectations
- Evaluate outcomes, not just recent events
- Consider both strengths and development opportunities
- Gather relevant feedback from key stakeholders (if applicable)
- Identify future goals and growth opportunities
- Prepare specific examples to support feedback
- Schedule adequate time for discussion

Questions to Ask Before the Review

- What accomplishments had the greatest impact on the team or organization?
- Where has the employee demonstrated growth?
- What obstacles affected performance?
- What skills should be developed moving forward?
- What support or resources may help improve performance?

Common Mistakes to Avoid

- Focusing only on recent performance
- Providing vague or unsupported feedback
- Comparing employees against one another
- Avoiding difficult conversations
- Making the review one-sided instead of collaborative

Performance Conversation Framework

1. Recognize Contributions

Discuss:

- Key accomplishments
- Strengths demonstrated
- Positive business impact
- Examples of success

Sample prompts:

- "What achievement are you most proud of this year?"
- "Which strengths helped you succeed?"

2. Discuss Opportunities for Growth

Focus On:

- Behaviors and outcomes
- Skill development
- Performance expectations

Sample prompts:

- "What challenges limited your success?"
- "What areas would you like to strengthen?"

Feedback Best Practices

Effective Feedback Is:

✓ Specific ✓ Timely ✓ Objective ✓ Actionable ✓ Balanced

Instead of:

"Communication needs improvement."

Try:

"Project updates were occasionally delayed, creating uncertainty for stakeholders. More frequent status updates would improve team communication."

Goal Setting & Development Planning

Creating Meaningful Goals

Strong goals are:

- Smart Goals/Clearly defined
- Measurable when possible
- Aligned with business objectives
- Realistic yet challenging
- Time-bound

Development Areas - Key Goals for Next Review Period

Goal 1: _____

Success Measure: _____

Goal 2: _____

Success Measure: _____

Goal 3: _____

Success Measure: _____

Follow-Up Recommendations

Performance management should not happen once per year. Consider:

- Quarterly check-ins
- Ongoing coaching conversations
- Goal progress discussions
- Recognition throughout the year
- Development plan reviews

Performance Reviews Drive Retention

Employees who receive regular feedback, clear expectations, and development opportunities are more likely to stay engaged and committed to organizational success.

RESOURCES:

Performance Review & Development Worksheet: (pages 4-6) An editable manager and employee discussion form.

- Use this form as a starting point to document a collaborative, job-related review. Modify it to reflect your organization's roles, policies, and review schedule.
- Describe expectations, evidence, and areas where performance
 - Met
 - Exceeded, or
 - Did not Meet Expectations
- Request employee's self-reflection/accomplishments and challenges prior to filling this form.
- If you prefer using ratings, apply its existing definitions consistently.
- Development/performance improvement opportunities should convert to future goals.
- Record handling: Keep completed reviews confidential and retain them according to applicable law and your organization's retention policy.

Coaching Check-In Template: (page 7) A brief, repeatable conversation for ongoing performance and development.

- Recommended use: 15–30 minutes at a regular interval appropriate to the role. Focus on progress, obstacles, support, and a small number of commitments.
- Coaching notes should be factual, job-related, and stored securely. Use the employer's separate procedures when formal corrective action is warranted.

Need support creating performance review processes, compensation structures or employee retention strategies?
The Arnold Group can help.

PERFORMANCE REVIEW & DEVELOPMENT WORKSHEET

Employee name / Position / Department

Manager / Review period / Review date

1 | Employee self-reflection: accomplishments and challenges

2 | Key accomplishments and positive contributions (include examples)

3 | Performance against established responsibilities and expectations

4 | Strengths to leverage

PERFORMANCE REVIEW & DEVELOPMENT WORKSHEET

5 | Development or performance improvement opportunities

6 | Goals and development action plan

Goal 1 Performance Development

Expected result or behavior:

Success measure / evidence:

Employee action steps:

Target date / progress review date: _____

Goal 2 Performance Development

Expected result or behavior:

Success measure / evidence:

Employee action steps:

Target date / progress review date: _____

PERFORMANCE REVIEW & DEVELOPMENT WORKSHEET

Goal 3 Performance Development

Expected result or behavior:

Success measure / evidence:

Employee action steps:

Target date / progress review date:

7 | Employee comments or differing perspectives

8 | Agreed next steps and next check-in date

Employee acknowledgment: My signature confirms that this review was discussed with me and that I received it; it does not necessarily indicate agreement.

Employee signature: _____ Date: _____

Manager signature: _____ Date: _____

COACHING CHECK-IN TEMPLATE

Employee / Manager / Check-in date / Next check-in date

1 | What's working? Wins, progress, recognition

2 | What's getting in the way? Obstacles or performance concerns

3 | What's next? Priorities and agreed action steps

4 | Employee commitments (owner / action / due date)

5 | Manager support commitments (owner / action / due date)

6 | Follow-up: progress to revisit at next check-in