

# Performance Review Meeting Checklist

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## Preparation for the Review Meeting

- ☐ Understand the objectives and goals of the meeting.
- ☐ Anticipate questions and prepare clear, thoughtful responses.
- ☐ Choose a quiet, private space with minimal interruptions.

## Facilitating the Review Conversation

- ☐ Set a positive tone and help the employee feel comfortable.
- ☐ Provide balanced feedback—start with strengths, then address areas for improvement.
- ☐ Focus on job performance and behaviors, not personal traits.
- ☐ Use specific examples to illustrate both positive and constructive feedback.
- ☐ Encourage dialogue by asking questions and inviting the employee's input.
- ☐ When discussing improvement areas, outline actionable steps and clear objectives.
- ☐ Explore opportunities for growth, including career aspirations and development needs for future roles.

## Wrapping Up the Discussion

- ☐ Summarize key points and shared understandings from the conversation.
- ☐ Review agreed-upon action steps and establish timelines.
- ☐ Ensure the employee has time to review the appraisal and add written comments.
- ☐ Have the employee sign the form to acknowledge the discussion (clarify that the signature does not imply agreement with the content).

## Post-Review Follow-Up

- ☐ Check in with the employee on progress toward goals within the agreed timeframe.
- ☐ Offer support and encourage open discussion about successes and challenges.