Performance Reviews: A Guide for Managers

A performance review should clarify progress, recognize contribution, and agree on the next steps. Regular feedback throughout the year makes the formal conversation more useful.

PREPARE A FAIR, SPECIFIC CONVERSATION

1. **Explain the process.** Share timing, criteria, and the purpose of the review. Invite a brief self-assessment and give the employee time to prepare.

2. **Use the whole review period.** Gather concrete examples of results and job-related behaviors. Avoid allowing one recent event or personal impression to dominate.

3. **Review expectations and context.** Check whether goals, priorities, resources, or responsibilities changed. Evaluate against agreed requirements and consult HR on leave or accommodation issues.

4. **Discuss strengths and gaps directly.** Describe the example, its impact, and the expected standard. Invite the employee's perspective and distinguish observations from assumptions.

5. **Agree on support and follow-up.** Set specific goals, owners, resources, and review dates. Address concerns as they arise rather than saving them for the next annual meeting.

Avoid surprises

The review should build on ongoing coaching. Share concerns promptly and give the employee a clear opportunity to respond.

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Turn the review into an action plan

Employee: _____ Manager: _____
Review period: _____ Next check-in: _____

A SUGGESTED CONVERSATION FLOW

1. **Reflect:** Review accomplishments and the employee's perspective.
2. **Discuss:** Compare results with expectations using specific examples.
3. **Plan:** Choose a few priorities, development actions, and needed support.
4. **Confirm:** Summarize commitments and schedule the next check-in.

Goal / expected outcome	Measure / evidence	Support / owner	Review date
_____	_____	_____	_____
_____	_____	_____	
_____	_____	_____	_____
_____	_____	_____	
_____	_____	_____	_____
_____	_____	_____	

Example: For the next 30 days, complete the weekly report by noon Friday using the agreed accuracy checklist. The manager provides template training in week one; both review progress every Friday.

Document the discussion accurately, provide space for employee comments, and share the agreed plan. Follow your HR process for record access, retention, and any formal performance action.

Keep the conversation going

Use short check-ins to remove barriers, recognize progress, and adjust goals as business needs change.

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