

# Performance Review Checklist for Managers

A Step-by-Step Guide to Prepare and Conduct Impactful Reviews

## Pre-Review Preparation

- ☐ **Understand Role Expectations**  
Review the employee's current job description, responsibilities, and any recent role changes.
- ☐ **Review Historical Data**  
Look at past performance reviews, feedback history, and development goals.
- ☐ **Collect Quantitative Metrics**  
Pull KPIs, OKRs, or project-specific metrics that reflect the employee's impact.
- ☐ **Gather 360-Degree Feedback**  
Request input from peers, cross-functional partners, and direct reports to get a balanced view.
- ☐ **Evaluate Competencies & Behaviors**  
Assess soft skills like collaboration, communication, ownership, and problem-solving.
- ☐ **Identify Key Wins and Gaps**  
Document major accomplishments and areas that need development—with examples.
- ☐ **Prepare a Discussion Plan**  
Outline key talking points, strengths to highlight, and topics that may require sensitivity.

## Mindset & Environment Setup

- ☐ **Schedule Enough Time**  
Block uninterrupted time for the conversation—avoid rushing or cramming reviews.
- ☐ **Choose a Private, Comfortable Setting**  
Whether remote or in-person, ensure the setting encourages open conversation.
- ☐ **Set an Intentional Tone**  
Approach the review with a growth mindset and clarity of purpose.

## During the Review

- ☐ **Start with Appreciation**  
Acknowledge the employee's contributions and impact upfront.
- ☐ **Discuss Core Responsibilities & Results**  
Talk through expectations vs. outcomes for key areas of the role.
- ☐ **Share Constructive Feedback**  
Be specific, balanced, and focused on future improvement—not just past performance.
- ☐ **Discuss Career Aspirations**  
Understand where the employee wants to grow and how the company can support it.
- ☐ **Co-Create SMART Goals**  
Set clear, measurable, and time-bound goals aligned with team and company priorities.
- ☐ **Clarify Development Areas**  
Offer suggestions for skill-building, mentorship, or stretch projects.

## Post-Review Follow-Up

- ☐ **Document the Conversation**  
Summarize key takeaways, feedback, and goals in your review platform or tracker.
- ☐ **Share the Review Summary with the Employee**  
Ensure alignment and transparency.
- ☐ **Set Up Regular Check-Ins**  
Schedule monthly or bi-weekly touchpoints to revisit goals and offer support.
- ☐ **Track Progress on Development Plans**  
Monitor follow-through on action items and provide resources as needed.
- ☐ **Request Feedback on the Review Process**  
Ask employees what worked and what could be improved for next time.