



PERFORMANCE INTERVIEW CHECKLIST

BEFORE THE INTERVIEW

- Send out performance review appt email one week in advance of the appt to set expectations about what you want person being reviewed to prepare for the appt.
- Review their 360 feedback and be prepared to share your thoughts and what you will do differently and better as a result of that feedback.
- Be Prepared- know the objectives and goals of the meeting.
- Time and Place- choose a quiet, private spot where you won't be interrupted.

CONDUCTING THE INTERVIEW

- Default to curiosity without judgment.
- Look for opportunities to show empathy.
- Make a small development area bigger to not put people on the defensive.
- Listen to understand when its hardest – (Defensiveness, denial, deflections, excuses, criticism)
- Be vulnerable and normalize mistakes and development areas.
- Give balanced feedback, both positive and negative, but start with the positive.
- Focus on the job responsibilities and the behavior, not the person.
- Seek alignment when offering constructive feedback.
- Ask questions and allow the employee to provide feedback.
- When discussing areas for improvement, discuss methods and objectives for improvement.
- Discuss possibilities for advancement, the employee's aspirations, and professional development necessary to be a candidate for such future positions.

CONCLUSION

- Summarize and review the important points of the discussion.
- Restate the action steps that have been recommended and provide a time frame for completion.
- Create incremental S.M.A.R.T goals and 2-3 action steps per goal.
- Ask open-ended questions to confirm commitment and not agreement around the person's motivation, confidence, and commitment to do what they are agreeing to do.
- Make sure the employee reviews the appraisal and provides comments.
- Have the employee sign it to acknowledge that they have read it (does not signify agreement with the content).

FOLLOW-UP

- Set dates for follow-up with the employee to see how plans are proceeding within the given time frames.
- Offer the employee assistance in achieving objectives and encourage discussion of successes and obstacles.

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EMAIL TEMPLATE TO SEND REGARDING 360 PROCESS

Hi XX,

I am requesting in my efforts and commitment to improve as a coach, leader, and communicator your constructive and developmental feedback on the four questions below. I appreciate your trust and willingness to be courageous and honest with your answers and we can discuss in your review.

Some examples of areas you could offer feedback on in regard to the questions on the attached form:

- Availability
- Email responsiveness
- Proactive one-on-one coaching or development time
- Meeting effectiveness
- Follow-through
- Coaching and development time
- Problem-solving
- Empathy and providing support
- Accountability for mistakes
- Patience
- Other

Please complete the attached form and respond by **next Wednesday September 15th** at the latest.

Thanks,

XX

Make sure to obtain 360 feedback 48 hours prior to review so you have enough time to process your thoughts and prepare your responses.

Use the question template below as a guide for your responses.

1. What did you see here that surprised you?
2. What did you see here that validates and confirms a leadership approach you take?
3. What is something that you have done in the past but perhaps stopped doing at all or consistently that was pointed out in collective feedback?
4. What are some focus areas in coaching you would like to work on resulting from this feedback?
5. What are some incremental and immediate changes you will make on your own resulting from this feedback?

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UPWARD FEEDBACK FORM

Please answer the following four questions as I would value your feedback about:

- A. My management style
- B. The company itself
- C. Your peers

When providing feedback, please be specific which of the above you are referring to and we will discuss as part of the review process.



What is your manager doing that you would like them to **stop**?



What is your manager not doing that you would like them to **start**?



What is your manager doing that you would like them to **continue**?



What is your manager doing that you would like them to **improve**?

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PERFORMANCE REVIEW FORM

Date of Appraisal:

Period Appraised:

Important note: A performance review should be a summary of frequent positive and constructive feedback conversations during the year and not pose any surprises.

Employee Information	Appraiser Information
Name:	Appraiser's Name:
Job Title:	Job Title:
Hire Date:	

Major Accomplishments During Review Period

Managerial Competencies		
For each competency:		
- rate the employee's performance level on this competency		
- provide supporting comments		
Managerial Competencies	Individual Fulfillment	Comments
RESULTS FOCUS Displays a commitment to reach and/or exceed objectives or expected results. Maintains a high level of quality. Strives to improve and sets ambitious targets.	<input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations	
CUSTOMER FOCUS Consistently exhibits professional demeanor. Displays a commitment to satisfy both internal and external customers. Assesses and understands customer needs. Establishes lasting and balanced customer relationships. Gains customer trust and respect.	<input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations	
INITIATIVE Anticipates future events. Consults a wide range of information. Performs risk-benefit analysis. Makes courageous decisions when necessary.	<input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations	

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Managerial Competencies	Individual Fulfillment	Comments
<p>VISION & STRATEGY Understands key company strategies. Establishes link between daily activities and long-term strategies. Develops a strategic vision for his/her own activity. Critically evaluates emerging patterns and trends.</p>	<input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations	
<p>INNOVATION Explores and develops creative new solutions to improve performance and/or create competitive advantage. Demonstrates great curiosity to learn new things. Questions established patterns and processes. Promotes the sharing of ideas and best practices.</p>	<input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations	
<p>ACCOUNTABILITY Demonstrates accountability for actions either positive or negative. Both words and actions are consistent, setting the tone for others to do the same.</p>	<input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations	
<p>TEAM LEADERSHIP & PEOPLE DEVELOPMENT Promotes a learning environment. Provides fair and accurate feedback to others. Pursues opportunities to coach and mentor others.</p>	<input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations	
<p>LISTENING & COMMUNICATION Provides oral and written communication in a clear and precise manner. Practices attentive and active listening skills. Commands attention and can manage group process. Effective in a variety of formal presentation settings. Openly exchanges information in a timely manner. Knows who to keep informed. Converses with professionalism and integrity. Understands and uses confidential information with discretion. Tailors communication style to the needs of the recipient.</p>	<input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations	
<p>OPEN MIND & SENSITIVITY TOWARDS DIFFERENCES Works effectively with different groups of people. Adapts behavior to work efficiently with individuals of different backgrounds. Uses diversity in all its meanings for the common good of the company.</p>	<input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations	
<p>TEAMWORK / COLLABORATION Builds cooperation and commitment within the team. Fosters open dialogue and communication within the team. Strives for consensus decision making when appropriate. Functions in a joint cooperative manner while supporting the organization and department goals, plans, policies, and procedures. Openly shares information necessary to carry out tasks. Values and seeks input and expertise of others. Demonstrates respect for the opinion of others and gives credit where credit is due.</p>	<input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations	

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<p>TIME MANAGEMENT / INDEPENDENT WORKING Organizes work well and uses time effectively; adheres to schedules. Plans and completes work within established timeframe and deadlines. Works independently on assigned tasks and projects; accepts appropriate level of supervision and guidance.</p>	<p><input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations</p>	
<p>OPENNESS TO CHANGE / ADAPTABILITY Accepts constructive feedback; executes tasks independent of personal likes/dislikes; quickly accepts and implements change. Shows willingness to learn new methods, procedures, or techniques. Shifts strategy or approach in response to the demand of a situation.</p>	<p><input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations</p>	
<p>POSITIVE ATTITUDE Approaches work with enthusiasm and a sense of purpose. Demonstrates pride in accomplishing tasks. Creates and sustains positive working relationships. Listens patiently to others, avoids gossip, and negates rumors.</p>	<p><input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations</p>	
<p>DEPENDABILITY / PUNCTUALITY Reports for shift on time, rarely absent. Willing to stay when needed. Attends meetings as required and arrives on time. Fulfills commitments made to colleagues and supervisors.</p>	<p><input type="checkbox"/> - Below expectations <input type="checkbox"/> = Meets expectations <input type="checkbox"/> + Exceeds expectations</p>	

Strengths <i>(summarize 2 or 3)</i>	Improvement Areas <i>(summarize 2 or 3)</i>

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Training Needs

Enter training objectives, priorities, timing, and approaches.

DEVELOPMENT

Career Development

Record details of individual career development aspirations

Career Development Wishes and Recommendation

Position:

Comments:

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Overall Appraisal	<i>For an overall rating, refer to definitions at the end of document. In-between ratings are disallowed.</i>	<input type="checkbox"/> - Below Expectations <input type="checkbox"/> = Meets Expectations <input type="checkbox"/> + Exceeds Expectations
Appraiser Comments:		
Employee Comments:		

SIGNATURES

Employee:

Date:

Appraiser:

Date:

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