

Cheatsheet Checklist: Performance Review Preparation for Managers

<input type="checkbox"/>	Coaching for Manager	Managers need training to understand the best ways to communicate with and support their employees at all times, including formal performance reviews.
<input type="checkbox"/>	Allot Adequate Time	Make sure to provide employees enough time for peer and self-assessment reviews, and that you begin your performance reviews a week before the in-person review. Also, allocate enough time for your face-to-face meeting to review everything you need to cover.
<input type="checkbox"/>	Use Performance Logs	Take notes on positive performance, and if you notice something that needs to be corrected, jot it down and immediately have a conversation with your employee to redirect behavior or activities that need to change. Writing reviews should be much easier and take less time.
<input type="checkbox"/>	Written Reviews and Meetings Are Equally Important	Written and in-person assessments both need adequate attention.
<input type="checkbox"/>	Know Legal Obligations	Being aware of federal and state anti-discrimination and other laws and regulations is part of your responsibility as a manager and should be part of your ongoing training.
<input type="checkbox"/>	Understand Cross-Cultural and Sexual Harassment Issues	If your company doesn't provide training in these areas, you can ask for training as part of your own career development.
<input type="checkbox"/>	Understand Employee Reactions	Your interpersonal skills should be up to the challenge of dealing with emotional issues that may arise because of negative and positive assessments.
<input type="checkbox"/>	Timing and Cadence	Once-a-year assessments are usually not sufficient to cover every area you and your employee need to discuss. Feedback should be frequent and ongoing.
<input type="checkbox"/>	Review Job Plan	Supporting an employee's career pathway is an important way to support the company and build trust and engagement with employees.
<input type="checkbox"/>	Share Performance Review Format with Employee	Transparency is an important aspect of trust building and getting the most out of reviews for both you and your employee.
<input type="checkbox"/>	Establish Clear Goals and Objectives	Your employee should know what is expected and how achievements will be measured.
<input type="checkbox"/>	Two-Way Written Agendas	Agenda from manager to employee and from employee to manager should be shared and then worked into a single document before the meeting to cover all points.