



MANAGER CHECKLIST FOR WRITING THE PERFORMANCE REVIEW

Gathering the Right Information – “What Do I Need to Do So That I Have All of the Information I Need to Write My Direct Report’s Performance Review?”

What it Does:

Manager Checklist for Writing the Performance Review helps managers translate their assessments of direct reports’ performance into well-written, representative performance reviews.

How to Use it:

Review the activities in the checklist to identify the questions and activities managers should both consider and complete as part of the performance review creation process.

See below for considerations that managers should keep in mind as they write performance reviews for their direct reports. As a manager, follow these guidelines as they make sense for you based on your organization’s performance review objectives to create a completed and effective performance review.

- Have I required my direct report to provide me with a self-review so that I can identify and plan for areas of possible disagreement during the review?
- Have I requested feedback for my direct report from other sources (e.g. peers, internal customers, etc.) to ensure that I have a complete picture of his/her performance?
- Are those other sources the most appropriate sources for peer feedback? Have I considered the following questions when identifying sources for peer feedback?
 - Does this person have knowledge of at least one contribution of my direct report?
 - Does this person have knowledge of the impact of my direct report’s contributions at the project, functional, divisional, or enterprise level?
 - Can this person provide direct evidence to support those instances?

Including the Right Information – “Have I Used All Information and Feedback Submitted on Behalf of My Direct Report Effectively?”

- Have I used all of the themes from the feedback that was submitted on behalf of my direct report?
- Have I identified my direct report’s performance strengths and examples that demonstrate these strengths?
- Have I pinpointed key areas of my direct report’s development areas that I will address during the review, and have I identified concrete examples that effectively summarize these development areas?
- Have I identified possible action steps that my direct report and I can take to help close any development gaps?
- Have I created an outline of talking points where the bulk of the review focuses on strengths and any development areas are put into context?
- Have I ensured that I have a plan for next steps (e.g. timeline for creating a development plan)?

Putting the Performance Review in Context – “What Do I Need to Do to Ensure That My Direct Report’s Performance Review is Complete?”



- Is any of the language I've used to within the performance review vague or imprecise?
- Is the language constructive and action-oriented so that feedback feels realistic to my direct report?
- How should I as a manager recognize and weight different performance criteria?
- Do I understand if/how organizational values and/or cultural feedback should be included as part of the performance review?
- Do I tell a clear, holistic narrative of my direct report's performance?
- Do I link my direct report's performance back to organizational and business unit goals?
- Have I captured all specific requests of my organization based on the format we use to present our performance review feedback?
- Have I assigned my direct report the appropriate performance rating (if applicable)? Especially if this is my first performance review as a manager, do I understand the rating scale (if applicable) my organization uses and how to evaluate my direct reports against it?
- Do I have any outstanding questions on how to complete the review for my direct report? If so, can I get in touch with my business unit's paired HR Business Partner?