Leaders/Managers: Preparing for the Final Year End Review

1. **Set your intention for the meeting:**
   Developing high levels of performance is a multi year process for most people. If this is your first Final Review discussion with this employee, set the outcome to simply reach a shared understanding. As you go through several cycles of PDP, both of you will refine your skills of reviewing and assessing performance.

2. **Shared accountability:**
   Remember, this is a shared accountability between you and each of your employees. This means reviewing and assessing is equally shared between both you and the employee.

   Each employee should be asked to prepare a draft summarizing their overall performance over the past year. This will include progress against goals, successes, and any areas where goals did not quite meet expectations. Let them know that you will be reviewing your notes as well and will provide them with your thoughts on their successes, strengths, and any areas needing further development or goals that weren’t met.

3. **S.M.A.R.T. goals help:**
   You will find that the S.M.A.R.T.er each of the goals are, the closer you and the employee will be in terms of expectations. If you find that the goals were not as clear as they could have been, for example there is misunderstanding on the timing or exactly what was going to be accomplished, then err on your employee’s understanding. You can work towards making goals more specific for the coming year by identifying where the gaps are and tightening them up with more measures and targets. Again, the overall objective here is to build a shared understanding.

4. **No surprises:**
   Having had regular check-in meetings with each of your employees over the course of the year which allowed for ‘course correction’ early on if performance was going off track, there should be NO surprises at this point in the process. Both you and the employee should hopefully be fairly close in your assessment of their performance.

5. **Make the experience positive:**
   For some people, this will be their very first review EVER and it’s important that the experience be a positive one. As a manager it’s critical to provide examples of what went well, how they contributed to the department and the value that the contribution made to the department. Simply saying ‘good job’ is not acceptable. Get specific with your feedback.

6. **Focus on their strengths:**
   Keep in mind that the majority of people, when asked to review themselves, tend to be harder on themselves than their managers. This is your opportunity to realistically ‘sing their praises’.

7. **Take a coach approach:**
   If some of the goals haven’t been met, use coaching questions to help identify what could have been done differently, and what would they have needed to have been more successful. Discuss whether these goals need to continue and form part of the coming year’s plan. Refer to your training materials for examples of coaching questions.

8. **Give them choice:**
   Research shows that receiving feedback of any kind can be highly stressful for most people regardless of how well it’s done. Part of this stress is feeling a loss of control. Give them as much choice as you can in setting the dates for the discussion and ask them where they’d feel most comfortable meeting (their office or a neutral quiet location).

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