

# Lesson 1 Key Takeaways:

## Set the Stage for a Productive Review

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### Targeting The Feedback To The Individual

Part of what makes these reviews valuable is the employee's preparation. The more thought they put into the process, the more they get out of it.

The following are questions you can give to your employee in advance in order to prepare them for their performance review.

1. What are your job responsibilities, as you understand them?
2. Rate and evaluate how you are doing in each area.
3. What aspect of your performance are you most pleased with?
4. On what aspect of your performance do you think you need to work hardest in the coming months?
5. What skills do you want to improve most on and how do you plan to do it?
6. What is the one thing you are happiest about in your current work environment?
7. What is the one thing you are unhappiest about and would like to change?
8. How are we doing in satisfying your needs?

### Performance Review Checklist

- Schedule a review date.
- Give pre-review questions to the employee two weeks in advance.
- Review past reviews for each employee.
- Check your own notes about the employee.
- Choose 2-3 points to focus on.
- Formulate a few goals for the employee.
- Ensure the employee's goals align with company strategy.

## Timing

- Employees who are new to the job or the company need more direction and frequent feedback.
- More experienced employees still need feedback but not as frequently or as formally as newer employees. It's important not to "back off" from challenging them and helping them to improve.

## Employee Preparation

- About two weeks out, set a time and place for the review.
- Prepare the employee for the review by having a brief conversation with them and presenting them with pre-review questions.

## Manager Preparation

- Focus on things that will make a difference.
- Limit focus to 2 or 3 key things (don't do a laundry list).
- Avoid summations of everything good or bad in past year.
- Be straightforward. Sugar-coating helps no one.