



Performance Review Prep Checklist

Reviews that build trust instead of dread.

BEFORE THE REVIEW

- ☐ Specific examples gathered — not general impressions
- ☐ Goals from the last check-in reviewed
- ☐ Self-assessment requested from the employee
- ☐ Uninterrupted time blocked for the conversation

DURING THE REVIEW

- ☐ Led with specifics, not generalities
- ☐ Strengths and growth areas both discussed
- ☐ Clear, measurable goals set for the next period
- ☐ Room left for a genuine two-way conversation

AFTER

- ☐ Review documented in writing
- ☐ Agreed action items followed up on
- ☐ Performance concerns flagged early — not saved for the next cycle