



Performance Review Checklist

MANAGER



If you are a manager, use this checklist to conduct a detailed performance review and make the most out of the evaluation process.

Before the performance review:

- ☐ Lay out clear expectations
- ☐ Create goals and objectives
- ☐ Collect feedback from the mentee's colleagues and other stakeholders
- ☐ Schedule the performance review meeting
- ☐ Ask your mentee to complete a self-evaluation

Prepare for the meeting:

- ☐ Review your mentee's most recent performance review
- ☐ Review your mentee's self-evaluation
- ☐ Look at the feedback collected
- ☐ Review your mentee's goals and progress
- ☐ Prepare a list of expectations, goals, and next steps to discuss
- ☐ Complete and share your performance perspective in advance

During the performance review:

- ☐ Talk openly with your mentee about their performance expectations
- ☐ Use specific examples to illustrate strengths and areas for improvement
- ☐ Ask your mentee to reflect on their achievements, challenges faced, and goals
- ☐ Collaboratively set goals and objectives for the upcoming review period
- ☐ Discuss opportunities for training and skill development to help the mentee succeed
- ☐ Create a development plan outlining steps for improvement and growth
- ☐ Ask for feedback about yourself

After the performance review:

- ☐ Take notes of the performance review
- ☐ Finalize and sign the employee review form
- ☐ Seek feedback from the mentee on the review process
- ☐ Ensure you follow-up on the development plan



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