

Performance Conversations Tips

Self Evaluation Questions:

- ❖ What are your most important accomplishments and achievements since your last review?
- ❖ Has the past year been better or worse for you than previous years in this position?
- ❖ Have you achieved the goals set during your previous review?
- ❖ Have you surpassed any of your goals?
- ❖ Are you struggling with any goals? Which ones? What's hindering you from achieving them?
- ❖ What do you hope to achieve in the upcoming year?
- ❖ What can your manager or organization do to better help you succeed?

Preparing for the Performance Conversation

- ❖ This is a summary of your employee's performance throughout the year
 - Schedule check-ins! Nothing in the evaluation should be a surprise
- ❖ Document your impressions
- ❖ Gather necessary materials, including your employee's self appraisal and 360-degree or skip-level feedback
- ❖ Find a suitable time and place for the meeting
- ❖ Set the right tone during discussion
- ❖ Offer feedback that the recipient can use to grow
- ❖ Define next steps, including setting goals and creating a development plan
- ❖ Follow up with your direct report
- ❖ Assess your own effectiveness in the appraisal process

Having the Feedback Conversation *(from Center for Creative Leadership)*

- ❖ **Situation:** Describe the situation. Be specific about when and where it occurred. Avoid generalities.
- ❖ **Behavior:** Describe the observable behavior. Don't assume you know what the other person was thinking. Keep to facts. Don't insert opinions or judgments.
- ❖ **Impact/Intent:** Describe what you thought or felt in reaction to the behavior. Ask about the person's original intent.
- ❖ **Change:** Describe the change you want to see. What are your expectations moving forward?