

Annual Performance Review Preparation Checklist

Use this checklist before an annual performance or appraisal discussion so the meeting is evidence-based, balanced and useful.

Details

EMPLOYEE	ROLE
MANAGER	REVIEW PERIOD
PLANNED REVIEW DATE	

Before the meeting

☐	Review the employee role and current responsibilities
☐	Review previous objectives and agreed actions
☐	Gather relevant evidence and specific examples
☐	Identify achievements and positive contribution
☐	Identify challenges or areas requiring discussion
☐	Review development and training activity
☐	Consider future priorities and potential objectives
☐	Consider appropriate support and resources
☐	Give the employee an appropriate opportunity to prepare
☐	Arrange suitable time, privacy and location
☐	Check the relevant organisational review process

Fair and useful review

☐	Use evidence rather than assumptions
☐	Plan a balanced discussion that recognises strengths and challenges
☐	Make space for employee input and questions
☐	Use specific examples and realistic objectives
☐	Discuss appropriate support and record agreed actions

Notes and points to discuss

USE THIS RESOURCE CAREFULLY *This checklist supports preparation and does not replace the organisation review process or determine any employment outcome.*

FREE INTERACTIVE TOOL SMART Objective Builder | </free-tools/smart-objective-builder>

COMPLETE PAID WORKFLOW Annual Performance Review Toolkit | </toolkits/annual-performance-review>