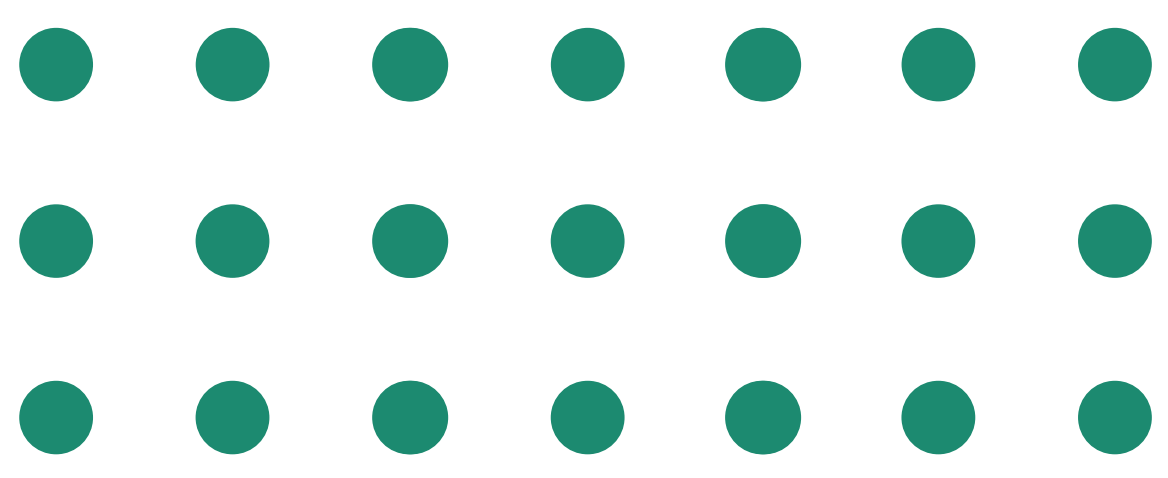


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# PERFORMANCE CHECK-IN GUIDE

How to get ready, what to cover, and how to look ahead together.





## WHAT WILL THIS GUIDE COVER?

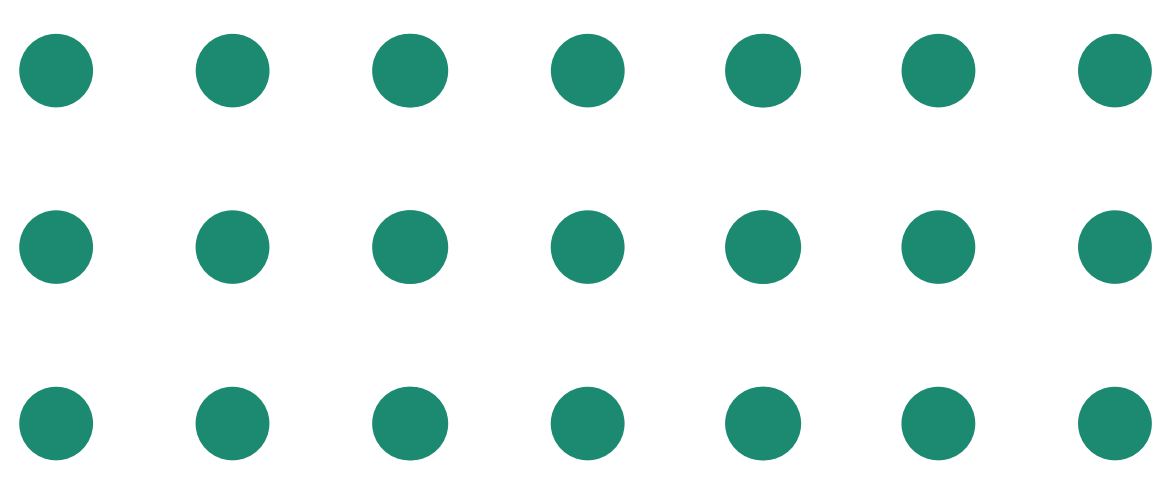
This guide will cover what a performance review check-in is, how to prepare for one, and a recommended agenda.

## WHAT IS A PERFORMANCE REVIEW CHECK-IN?

A performance review check-in is a meeting between a manager and their direct report(s) to discuss the results of a recent performance evaluation. The objective of the performance review check-in is to discuss and align on areas of positive performance and areas for development. All teammates participate in an organization-wide performance review once per year. People Operations announces title changes to the organization after the performance check-in period.

- When: Every February-March (Q1).
- Purpose: Managers and direct report(s) review what has been accomplished over the past 12 months (how did I do?) and evaluate how one is performing against expectations for their [position standards](#).





# HOW TO PREPARE FOR THE PERFORMANCE REVIEW CHECK-IN:

## BEFORE THE CHECK-IN

### Direct Reports:

- If you received an "anytime feedback" request for a colleague, submit your feedback.
- Complete and submit a self-reflection.

### Managers:

- Managers have the option to request anytime feedback
- Draft performance reviews.
- Get approval from the director of your focus area/department for any promotion recommendations.
- [Share performance review\(s\)](#) ahead of your check-in meeting.
- Review the check-in agenda (see next page) and prepare key discussion points and notes.

## DURING THE CHECK-IN:

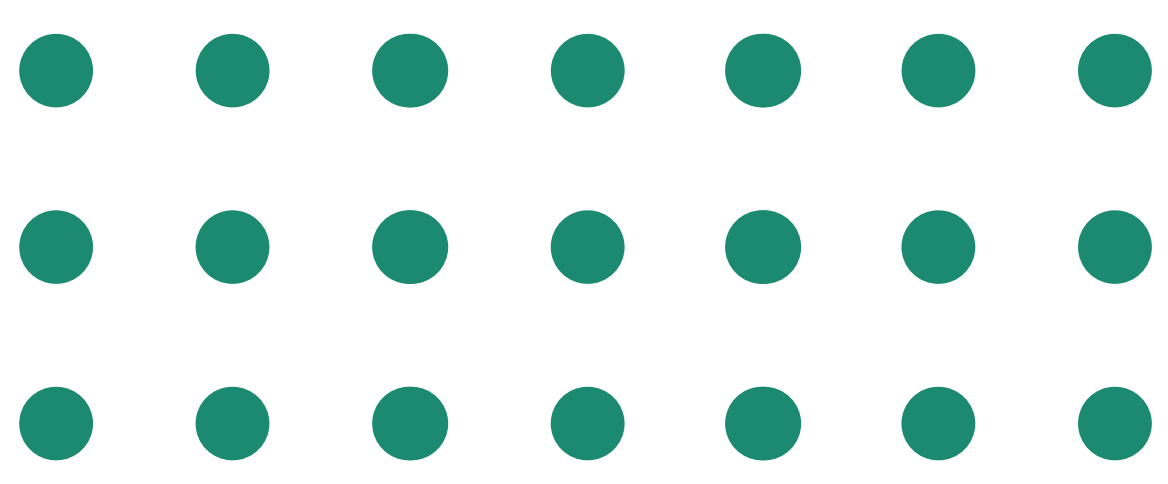
- Review and discuss the performance review.
- Align on development priorities and [target outcomes](#) for the next 6 months

## AFTER THE CHECK-IN:

### Direct Reports:

- Update existing target outcomes and resubmit your self reflection after meeting with your manager.





# PERFORMANCE REVIEW CHECK-IN AGENDA

Managers are expected to prepare for and lead the performance review check-in. Managers should use the prompts below to start conversations – coaching in particular areas as needed.

## > DEBRIEF OPEN-ENDED QUESTIONS

Manager debrief

- Review the open-ended responses (referencing self-reflections and feedback in Culture Amp).
- Celebrate wins and discuss any opportunities for further development.

Questions for Direct Report

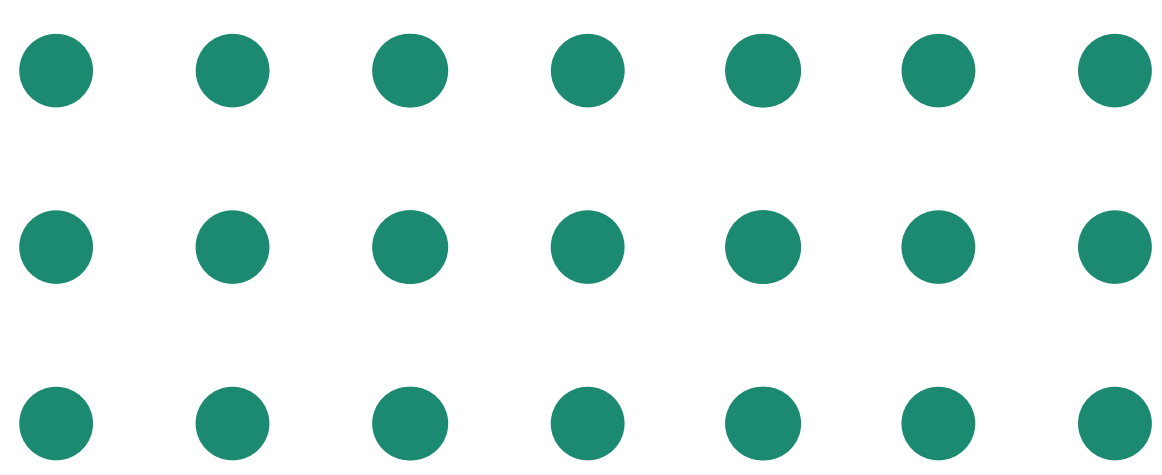
- What are your thoughts about your performance review?
- Was there anything surprising that came up in the review or feedback?
  - Take a moment to address any gaps in awareness from self-reflection if needed

## > DEBRIEF POSITION STANDARD RATINGS

Manager debrief

- Discuss how performance review translated to position standard ratings.
- Point out specific points in each standard that the teammate has not mastered and should focus on.
- Share how performance review resulted in a recommendation for hold, merit increase, or promotion (title change).





### Questions for Direct Report

- What are your thoughts about your ratings?
- Did any of the ratings surprise you?

## > PLOT DEVELOPMENT PLAN

(Shift from “How did I do?” to “How can I continue to improve?”)

### Questions for Direct Report

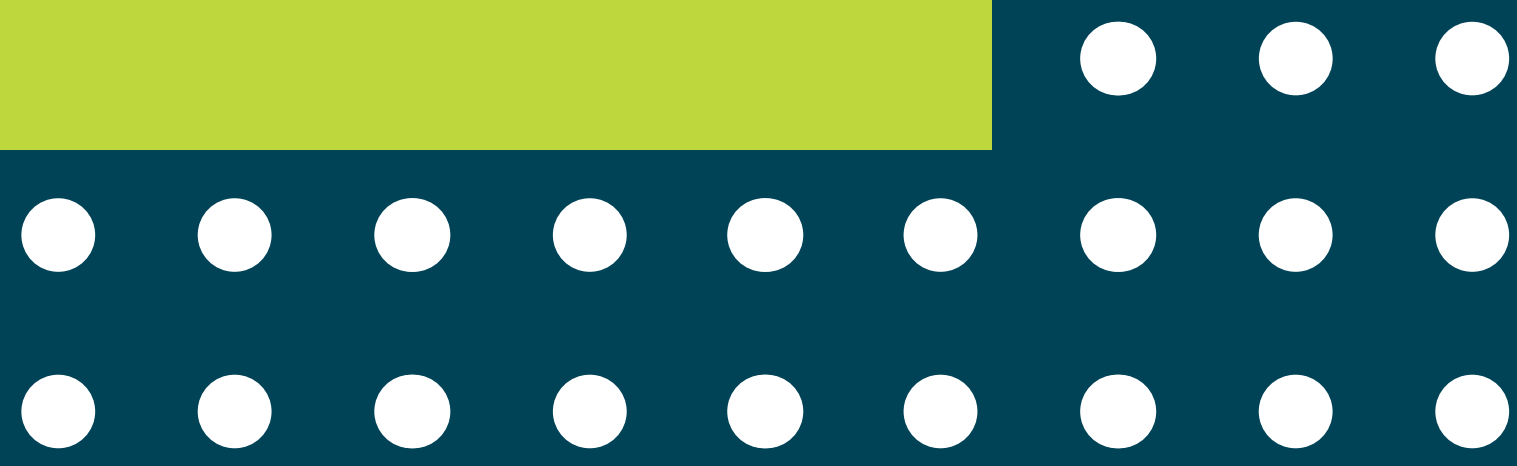
- [For title changes] What are new expectations and responsibilities for you after the title change?
- What are the [position standards](#) you want to focus your development on for the next 6 months?
  - What opportunities or projects can you work on to get more practice?
  - Do you predict facing any barriers or blockers?
- What would you like to have achieved 6 months from now?
  - Given your performance review, what goals do you want to set for yourself?
  - Thinking about your current goals – are they still relevant? Has anything become more or less important? Even though this is a performance review, it is ok to take time and update your goals!

## > CLOSE THE MEETING

### Questions for Direct Report

- What are you committing to between now and the next time we meet?
- What can I help you with between now and the next time we meet?
- Is there anything we didn't cover that you'd like to discuss now or next time?
- Direct Report: After your check-in, update your target outcomes.





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