

## **Tips for Clients: Tips for Conducting Reviews**

It's nearly time for you to review the performance of individuals on your team. Here's a simple checklist to help you get through the fundamentals of the review meeting.

### **Leading up to the meeting**

- Always announce the review in advance to allow for preparation.
- Agree on a specific time, place and specific topics for discussion. Find a suitable place for the review where you will not be disturbed.
- Prior to the review, ensure that both sides have taken time for thorough preparation. Encourage employees to bring up items for discussion to add to the agenda, so that the areas they wish to focus on are covered in the meeting.

### **What to cover in the meeting**

- An assessment of the employee's achievement of previously set goals
- Praise for goal achievement
- Identify the need(s) for improvement through training, coaching, supervision and ongoing professional development
- Establish new and agreed goals, as well as methods for achieving them
- Ensure that unsatisfactory performance is identified in a non-threatening way, and a solution agreed upon
- Ensure that employees are fully involved in the discussion and have the chance to express all the points they wish to make
- Ensure that employees can see how proposals made can be of benefit to them Summarize the conclusions of the review – ideally in writing