

EMPLOYEE PERFORMANCE APPRAISAL CHECKLIST

Performance appraisals exist to evaluate the employee's job performance and overall contribution to the company. They are generally a formal meeting and are conducted one-on-one, between the employee and their manager. It is up to you how frequently you conduct appraisals with your team but once every quarter is a good rule of thumb and helps to ensure everyone is on track.

It's important to discuss the employee's skills, achievements and growth. You should identify strengths as well as areas for improvement. This meeting is an opportunity to provide and receive feedback.

Setting goals and KPIs for the employee is a great way to keep everyone focused on the wider business objectives, as well as the individual employee's performance.

Use this checklist to create your own appraisal process.


STEPS TO UNDERTAKE BEFORE A PERFORMANCE APPRAISAL

■ Gather data relating to the employee's performance

This may include projects the employee has worked on, project turn-around time, attendance record etc.

■ Locate the notes from any previous review meetings

This will allow you to look back at what was achieved and agreed last time.



Ask the employee to create a self-evaluation document prior to the appraisal

The document could be a template of your creation that you send out prior to appraisals. It may ask the employee to detail things they feel they have done well, things they would like to improve on, areas they may require support and anything they would like to bring to the meeting/discuss with you.

Gather any written or recorded feedback on employee performance from other sources

Perhaps there are other colleagues, team members or clients who have feedback for the individual - people you would like to consult prior to the meeting.

Give thought to some future goals

What would you like the individual to achieve by the next performance review? What can the individual do to contribute to the business's goals and overall performance?

Clarify goals and objectives of the meeting

Write down exactly what you want to achieve from the meeting.

Create an agenda

Create a list of everything you want to discuss so you make sure to cover it all in the allotted time.

Schedule the meeting

Send the employee a calendar invite ahead of time, including the agenda, self-evaluation template and clear instructions of what you'd like them to bring to the meeting.

WHAT TO DO AND COVER DURING THE PERFORMANCE APPRAISAL

Create a positive environment

To ensure you both get what you need out of the appraisal, it's important to create a positive and comfortable environment. Conducting the meeting in a private space is a good place to start.

Discuss strengths and areas for improvement

Make sure to highlight and praise the employee's accomplishments. Credit where credit is due.

Discuss strengths and weaknesses


Go through what you both consider to be areas of good performance and areas where the individual may need some support to improve their skills.

Review the previous appraisal notes for completion of goals

Has the employee met the goals and objectives set during the last appraisal?

Determine future goals with the employee

Discuss the goals you prepared ahead of the meeting with the employee, ask them for their thoughts and if they have any goals of their own that they'd like to set themselves.



Present opportunities for career development

This may be where the areas of improvement you discussed come in. Perhaps some formal training is required? Or maybe their role requires them to have more up-to-date knowledge or qualifications due to industry or technological developments? Business needs and knowledge gaps within the organisation may also present opportunities for the employee.

Clarify action items

Agree actions going forward and any KPIs you'd like to set to help the employee stay on track until the next time you meet.

Settle any concerns the employee may have

Ask the employee if they'd like to discuss anything - it's important that the employee knows their thoughts, ideas and concerns are valued and that you create a space where they feel comfortable enough to raise them.

