READY-TO-USE TEMPLATE

Performance Reviews With No Surprises

Preparation for both people, a usable meeting agenda, and a shared follow-through record.

60 minutes | Performance review preparation and conversation

Use the supplied wording as it is, or change it together. The Word file and Notion template are editable. Keep only notes you need.

Before the meeting

Share the purpose, period, expectations, and any required process. Allow time for a written or spoken contribution.

We are reviewing [period] against the expectations we agreed. Please bring examples you want understood: contributions, obstacles, learning, and support you needed. I will bring my examples too. Let me know what format would help you participate. We will discuss differences rather than treating either account as complete.

Prepare a fair view of the whole period

Use examples across time and sources. Distinguish observation, interpretation, and unknowns. Do not introduce a serious concern for the first time as a surprise verdict.

Expectation or responsibility:
Specific example and date:
What happened and its effect:
Evidence or source we can check:
Context and support available:
The colleague's account:
What remains uncertain or disputed:

Notes and changes for our situation

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WORKING AGENDA / CONTINUED

0-10 minutes · Agree the purpose

Ask what they want included. Explain the boundary between this discussion and any separate pay or promotion decision.

What would make this review useful to you? What contribution or context should we be sure to understand? Here is how this conversation relates to [local review process]. If we disagree, we will record the difference and what needs checking.

10-35 minutes · Compare accounts

Start with contributions and learning, then discuss gaps using specific evidence. Include the manager's part.

What are you proud of, and what made it possible?
Where did expectations and reality diverge?
What did the circumstances make easier or harder?
Here is an example I want to understand with you: [observation and effect]. How did you experience it?
What support or clarity was missing from me?

Notes and changes for our situation

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WORKING AGENDA / CONTINUED

35-50 minutes · Choose the next priorities

Agree a small number of priorities. Separate a required expectation from an optional development interest.

Priority and why it matters:
What a useful result would look like:
Action the colleague agrees to take:
Support the manager commits to:
Time or resources needed:
Evidence we will review:
Date and owner:

50-60 minutes · Keep a shared record

Confirm what will be recorded, who can access it, and the next check-in. An acknowledgment is not automatic agreement.

What have we understood differently? What remains unresolved?
Our agreed next steps:
Manager follow-through:
Colleague follow-through:
Disputed point and how we will check it:
Next conversation date:
Where this record will be kept and who can access it:

The thinking behind it

Performance is shaped by expectations, opportunity, resources, and the way work is arranged. Review those conditions alongside contribution. The manager should leave with commitments too.

Read You Have a Culture Problem by Nic Payne

Keep the useful part

A shared record, not a transcript. Agree what belongs here and what should stay private.

Date / people / purpose

What we agreed

Next step / owner / support / date

What remains open

When we will return to it

What have I been evaluating as an individual shortcoming that needs a change in the work?