

Performance Review Cheat Sheet for Managers

Before the Review

1. Prepare Ahead of Time

- Review job description, past evaluations, and goals.
- Gather data: attendance, productivity, team feedback, KPIs.
- Avoid recency bias — consider the whole review period.

2. Set the Right Tone

- Schedule in advance.
- Choose a private, quiet setting.
- Block distractions (turn off phone, email notifications, etc.).

3. Clarify the Goal

- Focus on development, not just ratings.
- Be objective, not personal.
- Think forward, not just backward.

Evaluation Categories & Prompts

Category	What to Look For	Sample Phrases
Job Knowledge	Understands role, procedures, tools	Demonstrates strong knowledge of...
Quality of Work	Accuracy, attention to detail	Consistently delivers error-free work
Productivity	Meets deadlines, output	Completes tasks ahead of schedule
Communication	Clarity, listening, respect	Clearly communicates with team members
Teamwork	Cooperation, support, attitude	Works well with others to achieve goals
Initiative	Problem-solving, self-starter	Takes initiative without being asked
Dependability	Attendance, follow-through	Can always be counted on to...
Adaptability	Open to change, flexibility	Quickly adapts to new priorities
Leadership	Inspires, delegates, supports team	Provides guidance and motivation to peers

Phrases to Use

Positive Examples:

- “You’ve really exceeded expectations in...”
- “Your leadership on the [project name] was impressive.”
- “I’ve noticed your improvement in...”

Constructive Feedback:

- “One area where we’d like to see growth is...”
- “A goal for the next quarter is to improve...”
- “Let’s explore how you can handle X more effectively.”

Setting Goals

Use SMART Goals:

Specific | Measurable | Achievable | Relevant | Time-Bound

Example: “Increase response rate to customer tickets by 20% in Q3.”

Common Pitfalls to Avoid

- Focusing only on the most recent events
- Making it a one-sided conversation
- Avoiding tough topics
- Being vague with feedback or goals

At the End of the Review

- Summarize key points.
- Ask for their input: “What do you need from me to succeed?”
- Discuss next steps and goals.
- Have employee sign