



Conversation Guide for People Managers and Employees

During the year-end review process it is important to allow time for both the people manager and employee to discuss expectations, reflect on performance and share development opportunities. Managers and employees that regularly meet to discuss performance goals and behaviors often view this process as part of an ongoing cycle of dialogue and feedback.

What are best practices for the year-end review conversation?

For People Managers	For Employees
<p>Prepare</p> <ul style="list-style-type: none"> Establish purpose; review any agreed upon commitments from the Mid-Year calibration Review employee’s self-assessment; identify potential opportunities for employees to advance their skills and professional development Describe interactive format (two way dialogue) Select an appropriate location 	<p>Prepare</p> <ul style="list-style-type: none"> Review your annual goals, successes and opportunities. Define any challenges encountered; be honest about roadblocks Reflect on what support you need from your supervisor to be successful Identify any additional ways you contributed outside of your established goals
<p>Calibration: Engage and provide clarity</p> <ul style="list-style-type: none"> Encourage employee to participate in the conversation and share their feedback. Be an active listener Ask questions and celebrate successes; note accomplishments Ensure employee understands the impact they have on broader organizational goals Clearly communicate performance and behavioral expectations; provide specific feedback on the past years performance Manage pushback from challenging feedback respectfully; provide objective feedback and constructive examples for improvements 	<p>Calibration: Engage and seek clarity</p> <ul style="list-style-type: none"> Share your point of view; contribute to the conversation Offer concrete examples of your performance; share the areas where you need support or guidance Ask for specific feedback on your performance and behavioral competencies Identify potential opportunities to elevate your skill set and professional development Provide your manager with feedback on their leadership style Disagree respectfully; ask questions and listen



For People Managers	For Employees
Summarize discussion <ul style="list-style-type: none">• Highlight key points; define next steps• Thank employee for contribution• Commit to continued employee investment and support of career goals• Articulate timeframe to establish goals and competencies for upcoming fiscal year	Summarize discussion <ul style="list-style-type: none">• Ask any final questions; define next steps