

Year-End Work Planning | Manager's Guide

PREPARE

Collect 360 feedback on employees performance from multiple sources

- Consider other team members
- Consider other co-workers, peers and clients

Review key results from the employee's work plan (3rd column)

- Include learning and development results
- Record comments

AT THE MEETING

Have employees speak to their top three accomplishments, gaps or challenges and suggested solutions

- Ask questions for clarification
- Ensure you take time to get at the heart of how employees are feeling about their performance

Share feedback, recognize excellence and identify areas for future improvement

- It is important to include feedback on positive results
- Plan what you are going to say and prepare notes
- Describe specific behaviours and examples, not generalities

Provide and discuss overall assessment, and jointly sign off on the plan*

Set your initial work planning meeting for the new year to discuss expectations

Consider *what* was achieved and *how* the employee did their work

- Assess employee's competencies and living the values

Ask the employee to prepare for the performance review meeting by identifying:

- Top three accomplishments
- Any challenges or gaps in performance
- Solutions to overcome challenges

360 Feedback is a useful tool.

Use the following questions to collect feedback on your employee's performance:

- 1 – What do you see as the employee's strengths?
- 2 - What are the employee's opportunities for improvement?
- 3 - Any other comments you'd like to share.

* **Out-of-Scope** employees will have

two meetings:

- **Initial** – to discuss work plan and performance;
- **Wrap-up** - to do overall assessment and rating discussion.

In between meetings: submit proposed rating to your executive management team for review and approval.