

MANAGER MID YEAR REVIEW TO-DO LIST

Mid year review process overview

Step 1: Communicate expectations for scheduling your mid year reviews with your employees, giving them notice of deadlines (check with the HR team for deadlines).

Step 2: Meet with each of your employees to have the mid year review conversation. Be sure they have a full understanding of how they have performed thus far, & what they need to focus on to be successful going forward.

Mid year discussion agenda template

Set a positive tone for the discussion. Provide a brief update on organisational & team progress toward goals.

Review your employee's expected results (job responsibilities / duties & goals).

Ask the employee to share his/her perspective. Provide your feedback. Make any necessary adjustments & identify follow-up steps.

Review your employee's expected behaviours & competencies.

Ask the employee to share his/her perspective. Provide your feedback. Make any necessary adjustments & identify follow-up steps.

Solicit feedback about your role as manager & how you can support your employee's success.

Clarify next steps including documentation / update & re-approval of their performance & development plans.

Summarise & **thank your employee for his / her contribution.**