



# PERFORMANCE EVALUATION PROCESS

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**Thank you for downloading this guide.**  
This will help you streamline your performance evaluation  
process and help your organization thrive!.



# 01. TASKS FOR HR



- Determine objectives for both company-wide and individual performance and development (in consultation with senior leadership, if applicable).
- Review current evaluation processes and get feedback from stakeholders, managers, and employees.
- Assess overall company performance and note any trends in performance, engagement, or need for additional resources or support.
- Provide managers and employees with training resources on conducting effective performance reviews (this can start as early as new employee orientation!).
- Work with managers and/or employees to ensure that job descriptions and/or performance evaluation templates (if job-specific) are reviewed annually.

## Optional (but encouraged!)

- **Prepare a Questionnaire for Managers:** Managers can assess their leadership skills and how they believe they impact their employees.
- **Prepare Employee Self-Assessments:** This step encourages self-reflection and gives employees a sense of ownership in the process.

## 02. TASKS FOR MANAGERS



### BEFORE THE PERFORMANCE REVIEW

- Gather supporting documentation for how your direct reports performed throughout the year. This should include the employee's successes, goals, and areas for improvement.
- Look over previous employee performance reviews to assess if follow-up is needed on goals or growth areas.
- Review each employee's self-assessment (if applicable).
- Fill out the performance review questionnaire, including:
  - Expectations for the role and any goals you plan to set.
  - The employee's strengths and areas for improvement. (Be sure to include actionable plans when providing feedback!)
- Schedule a meeting with each of your employees, and notify them in advance of the date, time, and location of the meeting.
- Never spring an evaluation meeting on an employee.

## DURING THE PERFORMANCE REVIEW

- Discuss the employee's self-reflection assessment first and note what you agree with or would like to discuss further in this meeting.
- Discuss your observations since the last review that you have captured in advance. Start with positive feedback before moving into constructive feedback or growth opportunities.
- Work together to set individual goals and expectations that align with organizational goals for the next evaluation period.
- Discuss and incorporate the employee's personal career goals, including any areas they want to improve, career aspirations, and what tools they need to succeed.
- Ask for input and feedback from the employee and allow the employee to write comments or add them later to the assessment document.

## AFTER THE PERFORMANCE REVIEW

- Modify the performance plan as needed.
  - Send a copy of the finalized evaluation to your HR department or HR representative and the employee.
  - Follow up with the employee through consistent one-on-one meetings and check-ins throughout the year.
  - Consider scheduling quarterly or semiannual performance reviews to show your employee you are dedicated to their growth and available for strategic check-ins on growth and progress more than once a year or just a quick update in one-on-ones.
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## 03. TASKS FOR EMPLOYEES



### BEFORE THE PERFORMANCE REVIEW

- Create a list of successes, professional goals, and areas for growth to share during your review since your last review.
- Complete a self-assessment form (if applicable), and share with your supervisor well in advance of your meeting with your supervisor.

### DURING THE PERFORMANCE REVIEW

- Be prepared to receive feedback and ask questions for clarification.
- Work together to create goals and objectives.
- Discuss professional development opportunities such as training, mentorships, and courses.

## AFTER THE PERFORMANCE REVIEW

- Reflect on the feedback and any plans for improvement.
- Implement strategies for growth and development.
- Regularly check in with your manager to track progress and make adjustments as needed.
- Do not be shy, ask your manager for more feedback, support, or growth-oriented meetings as needed.

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**It's a lot to take in! Know that you do not have to go this alone.**

Copper Quail Consulting provides different plans to help you set up your team members, leaders, and HR representatives for success from day one to retirement.



*Disclaimer:*

*This is a non-comprehensive list of performance evaluation best practices.  
Discuss any compliance concerns with your legal counsel or trusted HR  
advisor to ensure you are following all relevant laws and regulations.*