

## Formal Performance Interview Planning Checklist

- [ ] Be prepared -- know the objectives and goals of the meeting
- [ ] Time and Place -- choose a quiet, private spot with as few interruptions as possible
- [ ] Conducting the interview
  - Create a positive environment and help the employee feel at ease
  - Give balanced feedback, both positive and negative, but start with the positive
  - Focus on the job, not the person
  - Ask questions and allow the employee to provide feedback
  - When discussing areas for improvement, discuss methods and objectives for improving
  - Discuss possibilities for advancement, the employee's aspirations and professional development necessary to be a candidate for such future positions
- [ ] Conclusion
  - Summarize and review the important points of the discussion
  - Restate the action steps that have been recommended and provide a time frame for completion
  - Make sure employee reviews the appraisal and provides comments
  - Have employee sign it to acknowledge that he or she has read it (does not signify agreement with the content)
- [ ] Follow-up
  - Follow-up with the employee to see how plans are proceeding within the given time frames
  - Offer the employee assistance in achieving objectives and encourage discussion of successes and obstacles