

Performance Review Prep Checklist

Before the cycle, during the conversation, in calibration and after it. A practical run sheet for People leaders and line managers.

By Ash Taherian, Product Sales Specialist, Revolut People, Dublin

How to use it

Print it or copy the boxes into your tracker. People teams own sections 1 and 4; managers own 2, 3 and 5. Tick as you go.

The one rule

Every rating needs evidence: what the person delivered, the skills they showed and how they lived your values, measured against the bar for their level.

1 Before the cycle opens People team, about two weeks ahead

- ☐ Confirm the review period, the dates for each step and who is in scope (decide now how to handle very recent joiners).
- ☐ Publish the **talent bar** for each level in scope. New to this? Start with two job families.
- ☐ Use the same scorecard statements for every manager in a job family: deliverables, skills and culture.
- ☐ Write the rating scale down, so one manager's "Advanced" means the same as another's.
- ☐ Name who calibrates, who facilitates and who signs off the final grades. Book calibration now, before calendars fill.
- ☐ Decide in advance what grades can lead to: promotion eligibility, development, improvement plan, pay.
- ☐ Brief managers in a short session: dates, the bar, the evidence rule and what changed since last cycle.

2 Before the conversation Manager, the week before

GATHER THE EVIDENCE

- ☐ Re-read the goals set at the start of the period and note which were met, missed or changed (and why).
- ☐ Pull examples from the **whole period**, not just the last few weeks: 1:1 notes, shipped work, feedback received.
- ☐ Ask other managers or leads who worked with the person for input.
- ☐ Fill in the scorecard with a one-line evidence note for every answer. No note, no rating.
- ☐ Compare the person with the bar for **their** level, not with teammates or with how easy they are to work with.

2. PLAN THE CONVERSATION (CONTINUED)

- ☐ Pick two or three key messages: one clear strength, one priority to grow, and the overall picture.
- ☐ If the rating may surprise them, plan how you will explain it with specific examples.
- ☐ Book a private slot with enough time (not squeezed between meetings) and ask them to bring their own view of the period.

3 During the review conversation Manager and employee

- ☐ **Open** by setting out the purpose and the shape of the meeting, so nobody is waiting for the "but".
- ☐ **Ask first.** Let them share their view of the period before you share yours.
- ☐ **Walk through the evidence** for deliverables, skills and culture. Use specific examples, not adjectives.
- ☐ Name strengths as clearly as gaps. Explain what "the next level" looks like against the talent bar.
- ☐ If the grade is not final until calibration, say so. Do not promise an outcome you cannot guarantee.
- ☐ **Listen** for context you missed and note anything that should change your evidence.
- ☐ **Agree next steps** together: one or two development priorities and the support you will give.
- ☐ **Close** by summarising what you agreed and when you will follow up. Write it down the same day.

PHRASES THAT HELP**Opening**

"I'd like us to look back at the period together and agree what comes next. Can you start with how you see it?"

Giving evidence

"When you led the handover in March, the team shipped on time without rework. That is what Advanced looks like here."

A gap

"For the next level, I'd want to see you owning this metric end to end. Today I'm still closing it out for you."

Closing

"So we've agreed two priorities. I'll put them in writing today and we'll check in at our next 1:1."

4 Calibration People team and leadership, about a week at most

- ☐ Check for **generous graders**, for example half of one team at the top grade. Ask the manager to name and evidence their strongest performers.
- ☐ Return scorecards with missing or thin evidence before the pre-read is built.
- ☐ Look at **outliers and sudden jumps**, such as a two-level change since last cycle, and ask what changed.
- ☐ Discuss people against the published bar, one case at a time, rather than ranking them against each other.
- ☐ Log every change: original grade, new grade, reason, evidence, approver.
- ☐ Senior leadership reviews and approves the final grades. Keep calibration materials inside the room.

Bands are a prompt, not a quota. If you use guideline bands, treat them as a reason to ask questions, especially in small teams where a percentage means only one or two people.

5 After the review Follow-up and goals

SHARE RESULTS

- ☐ Tell managers the final results before employees hear them.
- ☐ Discuss final results in the next 1:1 and explain the evidence, especially where calibration changed a grade.
- ☐ Take extra care with people near a grade boundary.
- ☐ Record the next step for each person: promotion path, development focus or improvement plan.

SET THE NEXT GOALS

- ☐ Agree goals for the next period that link to team and company goals, so the person can see where their work fits.
- ☐ Make each goal specific and measurable, with a date, and agree what evidence will show it was met.
- ☐ Turn the development priorities into actions: a stretch project, a skill to build, a person to learn from.
- ☐ Put a short check-in on goals into your regular 1:1s so the next review holds no surprises.

CLOSE THE LOOP

- ☐ Note what slowed the cycle and what to change next time.
- ☐ Check your bands or targets against your own context, not a borrowed benchmark.
- ☐ Book the dates for the next cycle.

! Red flags to act on straight away

Red flag	What to do
A manager rates almost everyone at the top grade	Ask them to name and evidence their strongest performers before calibration
Ratings submitted without evidence notes	Return them before the pre-read is built
A grade jumps two levels since last cycle	Add it to the outlier list for calibration
Scorecards changed after launch	Freeze changes and note them for next cycle
Employees hear results before managers are briefed	Pause the release until managers are ready

Want to go further?

Try the free tools on the playbook site: estimate what your review cycle costs, check your process in two minutes, or see if your HRIS is holding performance back. No call needed.

Free tools

peopleperformanceplaybook.com/tools/

Prefer to talk it through?

Book a 15-minute discovery call with Ash

About this checklist. Adapted from the People Performance Playbook (scorecards, a talent bar by seniority, a quarterly review and calibration cycle). Timings are the playbook's own guidance, not an industry benchmark. Example phrases are illustrative. Full method: peopleperformanceplaybook.com/performance-management-framework/

Disclosure. Ash Taherian works at Revolut People, which sells performance management software, so treat any product mentions as coming from an interested party. This checklist works with or without software.