

Review-cycle checklist

One page: set up, manager reviews, calibration, feedback and close-out.

1. Set up (before the cycle opens)

- ☐ Confirm the review period, the dates for each step and who is in scope.
- ☐ Publish the talent bar for each level in scope (start with two job families if new).
- ☐ Use the same scorecard statements for every manager in a job family.
- ☐ Name who calibrates, who facilitates and who signs off the final grades.
- ☐ Decide in advance what grades can lead to: promotion eligibility, development, improvement plan, pay.

2. Manager reviews (about 1 to 2 weeks)

- ☐ Send review requests to every line manager with the deadline.
- ☐ Managers gather input from other managers who worked with the person.
- ☐ Each scorecard answer has a one-line evidence note.
- ☐ Chase missing scorecards early so the cycle does not slip.

3. Calibration (about 1 week at most, with leadership review)

- ☐ Check for generous graders, for example half of one team at the top grade.
- ☐ Check for missing scorecards or thin evidence.
- ☐ Check outliers and sudden jumps in grade and ask what changed.
- ☐ Log every change: original grade, new grade, reason, evidence, approver.
- ☐ Senior leadership reviews and approves the final grades.

4. Announce and give feedback

- ☐ Tell managers the results before employees hear them.
- ☐ Managers discuss results in the next 1:1 and explain the evidence.
- ☐ Take extra care with people near a grade boundary.
- ☐ Record the next step: promotion path, development focus or improvement plan.

5. 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.

Want the full method?

Framework, talent bar and templates: peopleperformanceplaybook.com/performance-management-framework/
peopleperformanceplaybook.com/review-cycle-checklist/ | Book a 15-minute discovery call via the page