YEAR-END CONVERSATION TOOLKIT · SHEET 1 OF 4 · FOR MANAGERS

Appraisal & Rating Prep Sheet

Fill this in before the meeting. A fair rating is built on evidence, not impressions.

Team member: | **Review period:** | **Meeting date:**

1 Goals and evidence from the whole year

List the goals agreed at the start of the year. For each, note a specific example (what they did + the impact). Cover all four quarters, not just the last one.

Goal / KRA	Evidence: specific example and impact	Outcome (met / exceeded / not met)

Beyond the goals — behaviours, values, contribution to the team:

2 Bias check: tick once you've honestly considered each

- ☐ **Recency:** Have I given April–June the same weight as October–November?
- ☐ **Halo / horns:** Is one standout strength or one mistake colouring everything else?
- ☐ **Similarity:** Am I rating people who work like me more generously?
- ☐ **Central tendency:** Am I putting this person in the middle to avoid a hard conversation?
- ☐ **Leniency:** Am I inflating the rating to keep the peace?

3 Rating and rationale

Proposed rating:

Their self-assessment rating (if shared):

Why this rating, in two or three sentences linked to the evidence:

Where they might disagree, and how I'll respond:

Delivering it: Share the rating early, don't bury it. Then explain the "why" with evidence. If they disagree, listen first: *"Help me understand what you see differently."* Then close the rating discussion and pause before moving to development.

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YEAR-END CONVERSATION TOOLKIT · SHEET 2 OF 4 · FOR MANAGERS

Development Conversation Guide

Look Back · Look In · Look Ahead. Your team member should do about two-thirds of the talking.

Make the shift: *"We've talked about the rating. Now let's set that aside and talk about you and the year ahead."* Ideally hold this a few days after the rating conversation.

1 · Look Back

Aim: help them make sense of the year, including the learning in the hard parts.

- What are you most proud of this year?
- What was the toughest moment, and what did it teach you?
- What did you do differently this year compared to last year?
- Which piece of feedback this year was most useful to you?

2 · Look In

Aim: understand their strengths, energy and aspirations before planning anything.

- Which parts of your work give you the most energy? Which drain you?
- Where do others come to you for help? What does that say about your strengths?
- Where do you see yourself in two or three years? What would success look like?
- What's one thing about how you work that you'd like me to understand better?

3 · Look Ahead

Aim: agree on one or two specific growth goals and the support behind them.

- If you could get noticeably better at one thing next year, what would it be?
- What would that look like in your day-to-day work? How would we know?
- What experience, project or responsibility would stretch you in that direction?
- What do you need from me to make this happen?

Specific beats general

❌ A wish	✅ A goal
Improve communication skills.	Present the monthly project update to leadership myself from February, with a prep session with my manager before the first two.
Become more strategic.	Draft the Q2 plan for our team and walk my manager through the trade-offs before the March review.

Close the conversation

- ☐ One or two development goals agreed, in their words
- ☐ What they will do, and what I will do to support it
- ☐ First check-in date booked before leaving the room

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YEAR-END CONVERSATION TOOLKIT · SHEET 3 OF 4 · FOR TEAM MEMBERS

Year-End Self-Reflection

Managers: send this 3–5 days before the review. Team members: jot your thoughts and bring this to the meeting.

Name:

Manager:

1 Looking back at my year

My three most significant achievements (and the impact they had):

The toughest moment of my year, and what it taught me:

Goals I didn't fully meet, and what got in the way:

How I'd rate my own year, and why:

2 Looking in

Work that gives me energy:

Work that drains me:

Where I see myself in two or three years:

3 Looking ahead

One or two things I'd most like to grow in next year:

Support I'd find most useful from my manager:

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YEAR-END CONVERSATION TOOLKIT · SHEET 4 OF 4 · FILL IN TOGETHER

Development Plan for the Year Ahead

One page, one or two goals, real support, and dates in the calendar.

Team member:	Manager:	Date agreed:

Strengths to build on

Development goal 1

What I'll be able to do, and how we'll know (specific and observable):

70-20-10	Actions	By when
70 On the job stretch tasks, projects		
20 Through others mentoring, feedback		
10 Formal learning courses, reading		

Development goal 2 (optional)

What I'll be able to do, and how we'll know:

Key actions and dates:

Our commitments

I will (team member):

I will support by (manager):

Check-in 1 (January)	Check-in 2 (March)	Mid-year review
Date:	Date:	Date:

Want help with your year-end cycle? Human Training Consultants specialises in hiring, assessment, development conversations and coaching. Connect with us → humantraining.org/contact · ht@humantraining.org

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