

# Getting Started with Reviews Checklist

## CHECKLIST

### Before:

- Watch the Reviews feature walkthrough review any additional reference material
- Determine the purpose, cadence and outcome of the Review:
  - Is this mostly Administrative, Development Focused or a combination?
  - Will this be an annual process or is this designed to be more frequent? If this is more frequent, will you have some “lightweight” and some more formal versions over the course of a year?
  - What is the outcome of this Review process (i.e., Talent Mapping, Compensation / Promotion Decisions, Growth Plans, PD Goals)?
- Draft your Reviews Template
  - Are you including historical Objectives, 1on1s, Feedback or Recognitions data?
  - What questions are you including to evaluate performance (i.e., How will you assess behaviors and outcomes)?
  - Are you intending to launch multi-rater feedback as part of the Reviews launch? If so, have you thought through what direction you will give people around participant selection? Have you determined what template you will use for the multi-rater feedback?
  - Have you drafted your 1on1 template for the Reviews conversation?
- Determine your Reviews Workflow
  - Will your Manager and Employee Input stages be “double-blind” or will Managers be able to see Employee inputs as they populate their responses?
  - Will you include a “Skip Level Approval” step and if so, who will this fall to and why?
  - Are you including Multi-Rater feedback as part of this Review?
- Test your Review
  - Run your new Review with a small group of people within your team or with a pilot department and iterate.
  - Export your data to ensure it fulfills your reporting requirements.
- Communication and Training

- Schedule platform training / info sessions and send out your communications regarding your Reviews launch highlighting timeframes and support materials available.

**During:**

- After training is completed, launch your review
- Monitor progress and nudge completion using the progress indicators in the app (send reminders and use Programs to help with this).

**After:**

- Export your data and conduct analyses as needed
- Follow up with Managers to follow through with commitments.
  - Nudge a follow up 1-on-1 every quarter to check in on Reviews progress (review the last review and evaluate progress to date)
  - Ensure any outcomes such as Professional Development Plans or Goals are input into the app
  - Ensure that any Talent Indicators or Manager Only questions are finalized
  - Ensure that all 1-on-1 conversations are finalized
- Gather Feedback on the Process
  - How did your people find the process? Are there ways this could be improved or iterated upon for your next Review?
  - Did your Managers feel supported and enabled to have effective Reviews conversations? How could they be better equipped for the next round of Reviews and what can they do in between? Could they leverage their peers for additional support?