

Year-End Conversation Guide for managers

Year-end reviews provide each person with a longer-term perspective of their performance. This helps to guide both their future work and their career direction.

PURPOSE: To help people answer: “*How did I do?*” “*What does this tell me?*” and “*Where next?*”

HOW LONG: Approx. 30 to 60 minutes

HOW OFTEN: At the end of the performance cycle

To lead a start-up conversation

Say something like

Set the scene

- Open with warmth.
- Recap the purpose.
- Cover timing and notes.
- Introduce the conversation.

This is an important opportunity to reflect on the year / review cycle and then plan ahead.

Thank you for your hard work. Overall, you've had a (strong/mixed/challenging) year.

Looking back, what are your main thoughts about the year / review period as a whole?

Explore performance

O: Outcomes *How did I do?*

- Lead with recognition for key successes.
- Ask them to summarize their overall outcomes.

What are your thoughts about your impact in each goal?

What went especially well?

Where were your biggest challenges?

I: Insights *What does this tell me?*

- Analyze the drivers behind their performance.
- Explore the impact of the external environment.
- Explore insights into their personal capabilities and actions.

What were the key reasons for your successes?

What capabilities did you use that were particularly effective?

Where outcomes were not what you'd hoped for, what wider influences were behind that?

Where might your own actions or capabilities have influenced those outcomes?

L: Learning *Where next?*

- Explore what learning to take forward.
- Identify what support would be useful.

What insights would it be good to take forward?

How can I help?

Summarize

- Cover any additional areas such as career development, wellbeing, and promotion.
- Jointly summarize the conversation.
- Ask if they have any questions.
- End on a positive and forward-looking note.

What else would be useful to discuss?

Let's summarize together. Would you like to lead this?

Thank you for all your contributions to our unit.

Our goals for next year look exciting...