

Year-End Conversation Guide

for team members

Year-end reviews help you to summarize your progress updates into one overall picture. They cover:

‘How have I done?’- the **outcomes** you have achieved.

‘What does this mean for me?’ - the **insights** you have gained from those outcomes.

‘Where next?’ - the **learning** to take forward into your goals.

PURPOSE: To summarize your outcomes over the full performance cycle and apply that learning moving forward

HOW LONG: Approx. 30 to 60 minutes

HOW OFTEN: At the end of the performance cycle



To prepare

Before your conversation, it can be helpful to:

- Consider your overall impact during the performance cycle.
- Collect feedback from your key stakeholders.
- Collect any further data such as financial information, project outcomes, surveys, etc.
- Consider your progress with your development and career goals.

Explore what works

Say something like

My Outcomes

- Open by summarizing your key successes.
- Assess the outcomes you have achieved in each of your core priorities.
- Explore feedback you have received from others.
- Summarize the overall impact you have achieved.

I have achieved my greatest successes with...

Working through each goal in turn; my main successes and challenges have been...

The most important areas of feedback for me are...

Overall, my impact has been at [X] level

My Insights

- Analyze the drivers behind your performance. Consider both successes and challenges.
- Explore where the wider context may have influenced your outcomes.

Where the year has gone especially well, the main reasons for that were...

Where my results were not what I hoped for, the main reasons for this were...

Other factors that have affected my outcomes are...

My Learning

- Summarize what this means for you in terms of your actions going forward.
- Plan any follow-up where this is helpful.

To build this learning into my next set of goals I need to...

I would appreciate your support with...

Additional Areas

- Cover any wider issues or questions you may have.