Annual Evaluation Preparation

The full picture of this person's growth

Name:_____ Year being reviewed:_____

GATHER BEFORE YOU WRITE

☐ Read back through this year's Before, During, and After pages and Quarterly Conversation reviews.

☐ Review the Team Member Profile and the Commitment Tracker for this person.

☐ Gather specific examples of contributions, growth, and concerns, with dates.

☐ Review your organization's official evaluation form and timeline.

☐ Prepare for the conversation you may actually encounter, not only the one you hope to have.

THE YEAR IN REVIEW

What is the most significant growth I have witnessed in this person over the past year… the kind that will stay with them long after this role?

_____

_____

What were their greatest contributions this year… to the team, to the culture, to the people around them?

_____

_____

What patterns emerged across our conversations this year that tell an important story about this person?

_____

_____

HOW THEY ARE WIRED… A YEAR OF OBSERVATION

Where did I observe them operating most freely and powerfully… and where did I observe them straining against their own grain?

_____

_____

Where is there a gap between what the role expects and what this person naturally brings… and is that gap a development opportunity or a structural mismatch that needs to be addressed?

_____

_____

Is this the right role for this person at this stage of their growth… and if not, what role would allow them to thrive more fully?

_____

_____

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ACCOUNTABILITY… LOOKING BACK

What commitments did this person make across our conversations this year… and what was their honest follow-through over time?

What commitments did I make to this person this year… and did I honor them?

STRENGTHS, DEVELOPMENT, AND THE YEAR AHEAD

What strength grew most this year… and how will I intentionally build on it in the year ahead?

What is the single most important development focus for this person in the year ahead?

What does success look like for this person twelve months from now… specifically and honestly?

MY COMMITMENT TO THIS PERSON

What one investment… a conversation, an opportunity, a resource, a repositioning… would make the greatest difference for this person next year?

A CLOSING REFLECTION

Can I honestly say I gave this person my best leadership this year?

What does this person deserve to hear from me… that I may not have said clearly enough this year?

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