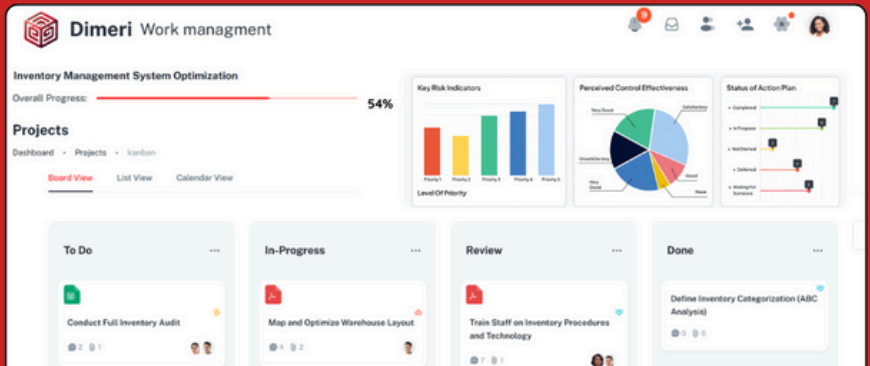


Your Tasks
Your Goals
Your Client
Your Project
Your Result
Your Team



End-of-Year Performance Review Setup Checklist

Guide for HR Managers to run smooth, consistent year-end reviews

1. Plan the Timeline

- ☐ Decide when self-evaluations will be sent out (e.g, early November).
- ☐ Set deadlines for manager reviews and one-on-one conversations.
- ☐ Align review deadlines with payroll, bonus, and reporting dates.
- ☐ Share the full schedule with managers and employees.

2. Prepare the Tools

- ☐ Finalize the review form(s) you'll use this year (manager, self, peer, 360).
- ☐ Test your chosen format (Word, Excel, or digital form).
- ☐ Store all templates in one central, easy-to-access location.

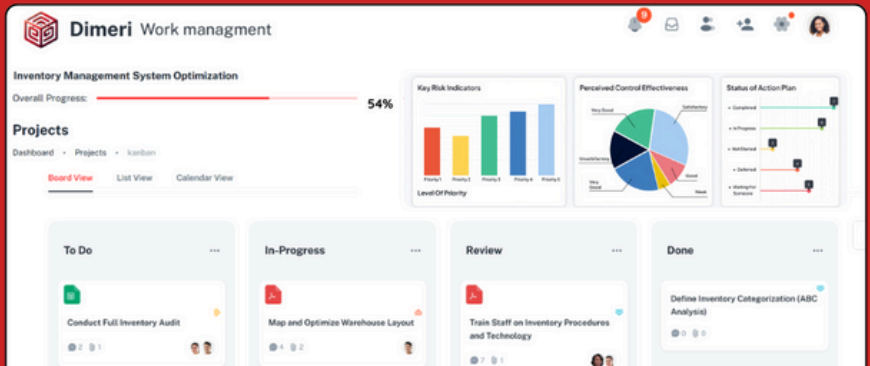
3. Equip Managers

- ☐ Share the manager prep guide with clear steps to follow.
- ☐ Ask managers to review each employee's goals, KPIs, and past feedback.
- ☐ Ensure managers book time for review conversations early.

4. Engage Employees Early

- ☐ Send self-evaluation forms 2–3 weeks before reviews begin.
- ☐ Guide employees on how to reflect on wins, challenges and growth needs.
- ☐ Offer a channel for questions or support during the process.

Your Tasks
•••••
Your Goals
•••••
Your Client
•••••
Your Project
•••••
Your Result
•••••
Your Team



5. Gather Feedback

- Request peer feedback where it adds value (team or 360 reviews).
- Check that feedback is specific and constructive.
- Track completion status to avoid last-minute delays.

6. Run the Conversations

- Start with the employee's self-evaluation to frame the discussion.
- Highlight achievements before talking about areas to improve.
- Set 2–3 SMART goals for the next cycle.
- Record notes and agreements during the meeting.

7. Wrap Up & Document

- Collect signed-off forms from managers and employees.
- Store records securely for compliance and audits.
- Summarize insights and share with leadership.

8. Look Ahead to 2026

- Turn review outcomes into training and development plans.
- Identify high-potential employees for future roles.
- Schedule Q1 check-ins to revisit goals early in the year.

Disclaimer

This checklist is provided as a general guide to help HR teams plan and manage year-end performance reviews. It does not constitute legal, compliance, or professional advice, and may not cover all requirements specific to your organization, industry, or country. HR teams should adapt the checklist to their internal policies and consult with legal, compliance, or labor experts where necessary. Dimeri.ai is not responsible for decisions made or actions taken based on the use of this resource.