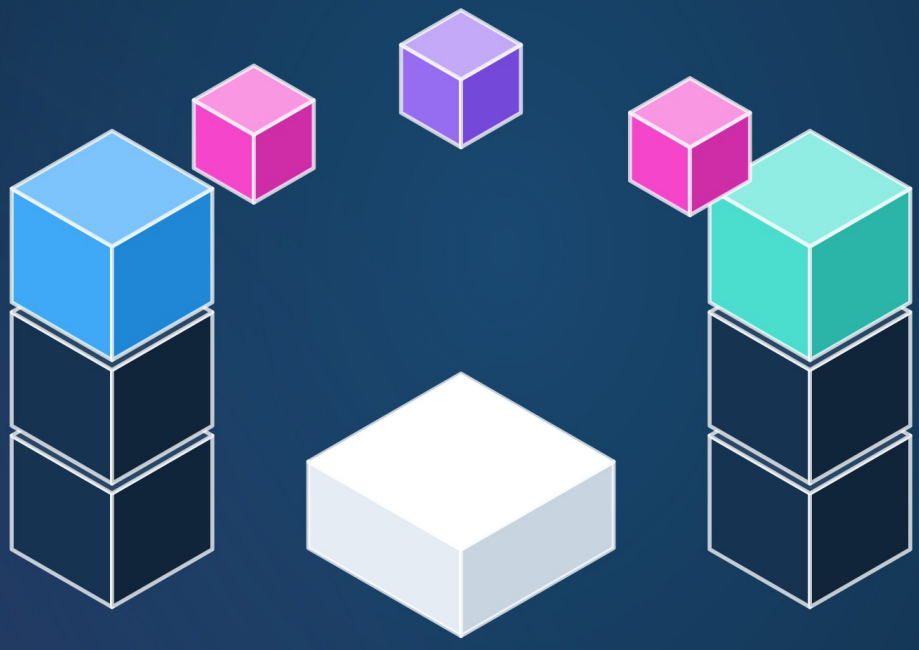
OPERATIONS INSIDER

LEAN · OPERATIONS · LEADERSHIP

PERFORMANCE REVIEWS AND FEEDBACK QUICK START CHECKLIST

Score the performance conversations of one area in one hour, with records you can point at.



AGREE. TALK. REVIEW. DEVELOP.

START HERE

How to Use This Check

One area, one hour with the area manager and two leaders, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Open the real records: the last review forms, the goal sheets, the calendar of the leaders and the list of people who left.	Score each statement from 0 to 4. Without a record, a note or a date you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individual leaders.
2	Partly in place, not consistent across teams or shifts.
3	Mostly in place and visible in the records.
4	Consistently in place, visible, reviewed and improved.

WHY PERFORMANCE CONVERSATIONS

People work better when they know what is expected, hear early how they are doing and see where they can grow. A form filled once a year delivers none of the three. Clear expectations, feedback during the work and a fair review do.

Before You Start

- **Scope:** one area with its leaders, from the shift leader to the area manager, and everyone who reports to them.
- **Evidence:** review records and goal sheets of the last twelve months, leader calendars, turnover of the area.
- **Tone:** you check the system, not single leaders or employees. No personal record leaves the room.

THE CHECK

01 Expectations and Goals

NO.	CHECK	SCORE 0 TO 4
01	Every role in the area has one page that names its main tasks, its measurable goals and the behavior that is expected.	
02	Every employee has two to four goals for the period, each with a measure, a starting value, a target and a date.	
03	Each individual goal is linked to a goal of the area, and the employee can say which one.	
04	Goals and expectations were agreed in a conversation, not sent as a form, and both sides hold a copy.	
05	Goals are checked at least once per quarter and changed in writing when the conditions change.	

02 Feedback in Daily Work

NO.	CHECK	SCORE 0 TO 4
06	Leaders give feedback within two working days of what they saw, and they name the observation, its effect and what they ask for.	
07	Recognition is as specific as criticism: it names what was done and what it made possible.	
08	Every employee has a short regular conversation with the direct leader at least once a month, with a date in the calendar.	
09	Each regular conversation leaves a note of a few lines: what was agreed, by whom and by when.	
10	Leaders ask for feedback on their own leadership at least twice a year and act on one point.	

THE CHECK

03 The Review Conversation

NO.	CHECK	SCORE 0 TO 4
11	Every employee has a review conversation at least twice a year, and the share held on time is known.	
12	The employee prepares a self-assessment against the same criteria the leader uses and receives the questions one week before.	
13	The leader brings evidence from the whole period: results, notes from the regular conversations and examples, not only the last weeks.	
14	The conversation follows a fixed sequence, the employee speaks first, and time and room are protected from interruptions.	
15	Nobody hears a rating or a criticism for the first time in the review, and the share of surprised employees is asked and known.	

04 Fair Rating and Calibration

NO.	CHECK	SCORE 0 TO 4
16	Performance is rated against written criteria with described levels, and every rating can be traced to goals and observed behavior.	
17	Leaders know the typical rating errors, such as leniency, closeness and the latest impression, and have practiced with cases.	
18	Leaders of one area compare their proposed ratings in a calibration round before any result is told to an employee.	
19	The spread of the average ratings between leaders is measured before and after the calibration round.	
20	Ratings rest only on performance and the agreed criteria, and the personnel department has checked criteria, forms and record storage.	

THE CHECK

05 Development and System

NO.	CHECK	SCORE 0 TO 4
21	Every review ends with a development plan of one to three actions with an owner and a date, and most actions are learning at work.	
22	For every leadership position and key role, a possible successor is named and has a development action.	
23	Underperformance is addressed within four weeks in a written agreement with expectation, support, review dates and documentation.	
24	The personnel department is involved by a fixed rule before any step with legal consequences, and every leader knows that rule.	
25	Rhythm, leader training and key figures such as review rate, goal achievement and turnover are reviewed by the area management twice a year.	

Your Result

BLOCK	POINTS	OUT OF
01 Expectations and Goals		20
02 Feedback in Daily Work		20
03 The Review Conversation		20
04 Fair Rating and Calibration		20
05 Development and System		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much of your review is ritual. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Ritual. A form once a year, if at all. Expectations live in the heads of the leaders.	Write a role and goal sheet per role. Start the monthly check-in.
40 to 59	Regular. Conversations happen and goals exist, but the rating depends on who gives it.	Describe criteria and levels. Run the first calibration round.
60 to 79	Fair. Ratings are comparable, reviews bring no surprises, plans are agreed.	Follow the development plans through. Handle underperformance by agreement.
80 to 100	System. Rhythm, training and key figures hold, and the effect shows in results.	Hold the level. Bring the next area in.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

> THE RULE FOR EVERY ACTION
>
> **Owner and date, or it did not happen. Repeat the check after six months and compare the blocks, not the feeling.**

Not legal advice. Labor law, co-determination, data protection and pay are checkpoints for the personnel department and legal review.

What to Do Next

NEXT STEP	WHAT YOU GET
STARTER KIT	The guide for the first 30 days in one team, plus the review workbook in Excel with roles, goals, preparation and register.
EXCELLENCE BUNDLE	The full playbook, a two-day workshop pack, eight templates, the Excel system with rating, calibration and key figures, and a workshop deck.

Both are available at operationsinsider.com.