



# COLLABORATIVE YEAR-END REFLECTIONS

Transforming Performance Reviews and Development Planning  
Meetings into Your Most Consequential Conversations of the Year

Performance reviews and development planning are regular year-end occurrences in most organizations. They range from 'check-the-box' administrative routines to watershed once-a-year accountings of contributions and transgressions to laborious documentation exercises. Which leaves many asking, 'there must be a better way.'

There is. The pages that follow offer guidance about how to prepare yourself and your team for the most consequential conversation of the year and celebrate achievements, highlight learning, prioritize development, and lay the foundation for stronger relationships - and strong performance in 2023 and beyond.

**59%** of employees think that traditional performance reviews have "no impact" on their personal performance.

Source: [Gartner](#)

**80%** of workers are dissatisfied with their performance reviews.

Source: [Deloitte](#)

**22%** of employees have called in sick rather than face a performance review;

**35%** have complained to their peers;

**15%** have cried.

Source: [Impraise](#)

If they felt they received an unfair performance review, **85%** of employees would consider quitting.

Source: [Clear Company](#)

**69%** of employees say they would work harder if they felt their efforts were better recognized.

Source: [Zenger and Folkman](#)

# THE STRUGGLE IS REAL

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Year-end reviews are likely not getting any easier. While many hoped that 'post-Covid', we'd settle into a new normal, life for many professionals is anything but normal. Businesses are struggling. Inflation and supply chain issues impact every dimension of life. Customer expectations are high—and tolerances are low. Employees are exhausted and overwhelmed.

If you're like most leaders, you're grappling with how to take all of this into consideration and facilitate a meaningful conversation that honors the reality of the employee's experience while driving understanding, motivation, and future focus. The key to success will be in finding the balance among grace, curiosity, and accountability.



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Grace is about cutting people the appropriate and fair amount of slack, acknowledging that some things simply became impossible to do under continued extraordinary challenges that presented themselves. This is about being human and treating employees as human beings too.



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Curiosity is about bringing a genuine inquisitiveness to the conversation and embodying a sense of humility that keeps the door open to learn more. It's about asking great questions that inspire thoughtful responses. And it's about listen to what's spoken—and unspoken to cultivate a complete understanding of the employee's experience.



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Accountability is about ensuring that people own their performance, effort, and the choices they made. It's about letting others know that despite barriers and setbacks, everyone is expected to bring the best they can to the workplace. It's about being fair—but real—about what could/should have been accomplished.

Striking this unique balance with each employee is the key to a review that will leave others feeling grounded and clear, yet supported and motivated to perform to the best of their abilities in the future. Here are questions and advice to help you do that.

# QUESTIONS TO DRIVE

## REFLECTION AND DIALOGUE

### BEGIN BY CONNECTING ON A HUMAN LEVEL

We are all human first.

And the past few years have served to bring that humanity to the forefront. People have a deep need for connection—now more than ever before. You can help to meet that need through the genuine and authentic care with which you approach the conversation. Start with questions like these.

- How are you and those you care about doing... really?
- How are you juggling everything in life?
- How are you taking care of yourself and your needs?

### REFLECT UPON ORGANIZATIONAL PERFORMANCE TOGETHER

Given continued workplace challenges this year, consider flipping the script and starting the conversation by jointly reflecting upon the organization's performance with questions like the ones that follow.

- Where has the organization stepped up and performed well over the past year?
- What makes you proud of us as an organization?
- Where have we, as an organization, struggled?

### INVITE THE EMPLOYEE TO SHARE THEIR SUCCESSES

After another challenging year, it's more important than ever to offer employees an opportunity to spotlight their successes and wallow in their wins. Consider these questions.

- Which goals and objectives did you reach?
- What went particularly well for you?
- Which achievements are you most proud of?
- Where did your effort really pay off?

## REVIEW UNREACHED (BUT STILL VALID) GOALS

In addition to successes, there may also be shortfalls, unmet goals and missed or partially achieved expectations to be discussed. This is a reality that must be acknowledged. Work together to explore, process, and fully understand where performance or development fell short—always with an eye toward the future, learning, agility, and improvement. These questions can help.

- How did results differ from your original goals and expectations?
- Which of your strengths and talents supported what you were able to achieve?
- Which impediments made goal achievement impossible?
- Which impediments made goal achievement more challenging?
- What have you learned and what will you do differently in the future?

## GIVE EQUAL TIME TO GROWTH AND LEARNING

It's easy for year-end reviews to go heavily on performance and light on development. But it's critical to help employees reflect deeply upon how they've grown, what new skills and abilities they've acquired, what they're more competent and confident at today, and how they can leverage that learning in today's uncertain business landscape. Dedicating sufficient time to unpacking what's been learned is not just instructive; it's inspiring. And it's the kind of high point on which you want to leave the conversation. Consider questions like these.

- What are the most important lessons you've learned over the past year?
- What new skills and competencies have you acquired?
- How have your expertise and ability to contribute grown?
- What are you looking forward to learning next year and beyond?

### EMPLOYEE PREPARATION

Employees will be considerably more prepared and engaged if they're able to reflect in advance. Consider sharing the following worksheet with employees in advance to ensure the richest possible conversation.

## A YEAR IN SUMMARY

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# EMPLOYEE REFLECTIONS WORKSHEET

Before our performance and development review conversation, please take some time to reflect on the past year. Use the questions that follow as a starting point, but include any information about what you achieved, confronted, overcame, and learned.

Please bring this worksheet to our review and be prepared to share your highlights from the past year.

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**WHAT DID YOU  
ACCOMPLISH THIS  
YEAR?**

**PRO TIP**

Don't be shy. This is no time for modesty. Create as expansive a list as possible of your contributions. Consider your Original goals and objectives; but look far beyond that to capture the many ways you've made a difference.

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**WHAT  
ACHIEVEMENTS  
ARE YOU MOST  
PROUD OF?**

**PRO TIP**

Looking back on that list, which accomplishments create within you the greatest sense of pride—and why?

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# EMPLOYEE REFLECTIONS WORKSHEET (CONTINUED)

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**WHAT WAS THE POSITIVE EFFECT OF YOUR ACHIEVEMENTS ON OTHERS—INCLUDING COWORKERS AND CUSTOMERS? ON THE DEPARTMENT? ON THE ORGANIZATION?**

**PRO TIP**

As you consider your accomplishments and achievements, also consider your impact. Specifically, what difference did you make—both on a business and Human Level?

**HOW HAS THE PAST YEAR HELPED YOU GROW?**

**PRO TIP**

Some of the most profound development we enjoy comes from difficulty and challenges; and there's been no shortage of either this year. How are you more knowledgeable and skillful today? What lessons have you learned that will be helpful in the future?

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While considerable time during performance and development reviews should be dedicated to celebrating your contributions and growth, you'll also want to consider the goals laid out at the beginning of the year and where you encountered challenges. Since a backward look can offer rich insights for future action, consider the following as well:

- Objectives you were unable to achieve this year and what specifically got in the way;
- Adjustments you made to accommodate changing conditions and any insights or new best practices discovered; and
- What goals or objectives remain unfinished and how you'll go about accomplishing them.

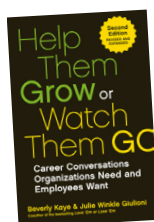
# DOS AND DON'TS

## FOR AN EFFECTIVE CONVERSATION

- ✓ Prepare like never before. Review previous conversations, interactions and feedback. Demonstrate your thoughtful approach to this important conversation.
- ✓ Be curious and adopt the intention to listen and understand.
- ✓ To the greatest extent possible, ask, don't tell. Draw insights out of others with effective, open-ended questions.
- ✓ Allow for silence and reflection.
- ✓ Recognize effort as well as results.
- ✓ Personalize the experience. One size never did and certainly doesn't now fit all.
- ✗ Rush it. Allow time to celebrate and explore experiences.
- ✗ Wait to hold the conversation face-to-face; do it virtually now, if necessary
- ✗ Treat it as an administrative exercise; this is a powerful opportunity to connect.
- ✗ Become defensive if differences or tensions emerge.
- ✗ Speak in generalities. Specifics demonstrate attention and value for the individual.
- ✗ Promise to 'make it up to them' next year if ratings or financial decisions are disappointing.

## DELVE INTO THE DYNAMICS OF CAREER CONVERSATIONS

LEARN MORE!



[julie@juliewinklegiulioni.com](mailto:julie@juliewinklegiulioni.com)



[juliewinklegiulioni.com](http://juliewinklegiulioni.com)



[JulieWinkleGiulioni](https://www.linkedin.com/company/JulieWinkleGiulioni)



[@julie\\_wg](https://twitter.com/julie_wg)