

ANNUAL APPRAISAL MEETING CHECKLIST

TEAM LEADER
 TEAM MEMBER

1. PREPARATION FOR THE APPRAISAL MEETING

- **Dedicate time** and make your team members feel appreciated – even when you are not satisfied with their performance; this is your moment to find out about the root causes
- **Prepare yourself** by reading into the targets that were set, listing the possible external opportunities and threats with respect to reaching these targets
- **Review your own performance** and the impact your team members, in terms of your own priorities and your behaviour
- **Create a positive and constructive atmosphere**, which supports the psychological safety of your team members, so that you both can be open to each other without fear
- **Make sure nobody disturbs** your meeting and avoid any distraction

2. APPRAISAL QUESTIONS FOR YOUR TEAM MEMBER

What did you do well?

What could you have done better?

What did I do well to support you?

What could I have done better to support you?

What should I continue to do to support you?

What else can I do to support you?

} **and WHY?**

3. UNDERSTAND EACH OTHER (JOHARI WINDOW)

	Known to you	Not known to you
Known to team member	<p>Arena: Drivers, reasons, shortcomings, and achievements that both the as you the team leader and team members know.</p> <p>These are drivers, reasons, shortcomings, and achievements that both you and your team members perceive.</p>	<p>Blind spot: Drivers, reasons, shortcomings, and achievements not selected by yourself, but only by your team members go here.</p> <p>These represent what your team member perceives but you as the team leader do not.</p>
Not known to team member	<p>Hidden, or Facade: Drivers, reasons, shortcomings, and achievements selected by you as the team leader, but not by your team member, go in this quadrant.</p> <p>These are things you both are either unaware of, or that are untrue, but for the your claim.</p>	<p>Unknown: Drivers, reasons, shortcomings, and achievements that neither your team members nor you the as the team leader are aware of, go here.</p> <p>They represent your behaviours or motives that no one participating recognizes—either because they do not apply or because of collective ignorance of these drivers, reasons, shortcomings, and achievements.</p>

4. Go to [STRATZR.com/posts](https://www.stratzr.com/posts) for more leadership development articles

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1. PREPARATION FOR THE APPRAISAL MEETING

- Prepare yourself by relating your performance to what is expected (your targets)
- Make a detailed, but structured list of what it took you to achieve the targets
- Make a list of valid arguments why you have not reached certain goals
- Quantify as much as possible what value you have added to the team and business
- Identify the impact of your achievements on your colleagues and your team leader
- Understand for yourself what your big picture is, concerning what you like to achieve in the next years
- Identify what you would need to perform
- Set the accompanying personal goals that support your big picture & what you would need to achieve this
- Compare your achievements of the past years with your future big picture, and base your promotion, salary and secondary benefits increase on this
- Whatever you ask for, be reasonable, come forward with valid arguments and go for the right balance between what you deliver and what you would like to receive in return

2. APPRAISAL QUESTIONS FOR YOUR TEAM MEMBER

What is really important to me and what satisfies me? (money, learning, status, comfort)

Have I done everything to support my wishes? (performance, consistency, impact on others, no flaws)

Do I have the capabilities? (skills, competencies, time, energy)

Do I have the motivation? (intrinsic, attitude, willpower, ambition)

Am I prepared for the consequences of a promotion? (More responsibility, traveling, spending more time at work, moving abroad, more stress)

Is the balance between achievements, commitments, dedication and rewards right?

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