

# PERFORMANCE REVIEW: CODE RED

## LEADER'S GUIDE



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## PERFORMANCE REVIEW: CODE RED

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## VIDEO-BASED TRAINING FROM VIDEO ARTS



### Why train?

“ *Train hard, fight easy - Marshal Zhukov*”

These days, it is difficult for organisations to become successful and stay that way. The pace of change is faster, competition is tougher, customers are more demanding, innovation is more prized, but harder to achieve.

Part of the response has been to create leaner, flatter, more flexible structures, but structures don't run organisations and create success, people do - intelligent people, energetic people, reliable people and, most of all, people with the right mix of up-to-date knowledge and skills.

That means people who are trained, not for a lifetime's work, not just once in a while, but as a central, continuing part of their working lives.

### Why use video-based training?

**Video is familiar.** Television is how most people find out what is going on in the world. It is not surprising that this is a medium they are comfortable to learn from when they are being trained.

**Video makes demonstration easy.** We can show situations being handled badly. We can contrast that with how to handle them well.

**Video is flexible.** It can be the cornerstone of a course run for a group by a specialist trainer. It can quickly provide simple, clear lessons for a team whenever it is convenient for them. It can bring interest and enlightenment to a

self-study programme.

**Video injects realism.** It lets us present those being trained with emotional, as well as rational, problems to solve. Ask a group 'How would you deal with an angry customer?' and you will get a tidy, textbook answer. Use video to confront them with an angry customer and you will get a much more realistic reaction. Video provides variety. Different people learn in different ways and none of us have an infinite attention span. Video provides us with a powerful means of injecting variety into our learning.

**Why use Video  
Arts  
programmes?**

“

***Winston Churchill once said that he loved to learn, but hated being taught.”***

That is the secret of successful training: how to help people who want to learn. We do it by combining:

- A storehouse of professional knowledge and expertise, developed over 40 years and drawing on some of the best minds in the business.
- The highest possible production values, both in the videos we produce and in the support material that goes with them.
- The magic ingredient - humour - can make the duller subject a delight.

## INTRODUCTION

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“

***People don't leave their jobs, they leave their managers”***

A review, when done well, is a powerful tool for improving communication between managers and managed. It strengthens organisations by its focus on performance and improvement. It motivates individuals by acknowledging their strengths and achievements and giving them an opportunity to discuss how their jobs can be done better.

Done badly, on the other hand, reviews are at best an irritating chore. At worst, it is a depressing and unpleasant experience for both manager and employee which can do serious damage to their working relationship. It is not surprising that many people dread them.

Performance Review: Code Red is a video-based training programme that helps managers get the most from employees by preparing and structuring the discussions properly and handling awkward situations (and people!) correctly.

This video has three parts, which are tied together by “Jones”, a secret agent like character who is alerted when a bad review is happening. Jones intervenes in each review, and shows the manager the right way to go about it.

Part one looks at how to review a timid employee, and how encourage them to open-up about what is bothering them. Managers may be tempted to talk over a shy employee, and assume their silence means everything is fine. By listening and creating a comfortable atmosphere, you can see how employees can relax, open up, and bring up any issues they may have.

Part two explores how a manager should prepare themselves to review a touchy employee who doesn't take criticism well. Managers can't leave all criticism to the review – they need to bring up issues when they happen so there are no surprises. By giving an employee a compliment they may learn to self-appraise and may even offer up a confession themselves.

Part three looks at employees who blame everyone else but themselves for their shortcomings. In a situation like this, a manager needs to keep the focus of the review on the employee, and get them to agree on a strategy for the future. Don't argue with them – focus on the facts and agree to measurable targets.

<b>Objectives</b>	<p>Those who work their way through Performance Review: Code Red will be able to:</p> <ul style="list-style-type: none"> <li>▪ Understand reviews.</li> <li>▪ Be able to prepare an effective review discussion.</li> <li>▪ Be able to begin the discussion positively, structure it as it unfolds and end it by agreeing the actions which arise from it.</li> <li>▪ Know how to cope with awkward situations which managers sometimes encounter, in particular:           <ul style="list-style-type: none"> <li>▪ encouraging a shy employee to explain what is bothering her</li> <li>▪ criticising someone who can be very touchy</li> <li>▪ getting an abrasive character to focus on his own performance, rather than blaming shortcomings on the company</li> </ul> </li> <li>▪ Identify specific actions which they can take to improve their review discussions.</li> </ul>
<b>Using Performance review: code red</b>	<ul style="list-style-type: none"> <li>▪ Dual use. The programme can be used either as a conventional training course with a small group or for self-study by individuals.</li> <li>▪ A PowerPoint presentation is supplied, so you can easily present to a classroom.</li> </ul>
<b>The target audience</b>	<p>The programme is designed principally for all managers whose responsibilities include reviewing their staff. Since a good review is always a two-way process, those who will be on the receiving end of the review will also benefit from it.</p>
<b>The course leader</b>	<p>The person leading a group through the programme does not have to be a professional trainer. Line managers will be able to deliver this course with confidence by using the materials and detailed guidance provided.</p>

## COURSE PROGRAMME

This is a suggested programme for a half-day course based on Performance Review: Code Red.

You may choose to incorporate additional sessions to cover key points specific to your organisation or just take elements of the course and run a series of short sessions covering each aspect of Performance Review: Code Red.

If you would like help in facilitating this course or in adapting it to your specific requirements, call Video Arts. An experienced training consultant can advise you or, for an agreed fee, design and run a course for you.

The programme overleaf is an outline of the course.

Each session is covered in detail later in the course leader's guide.

Session Number	Session content	Approx. timing
<b>Session 1</b>	<b>Introduction</b>	<b>10 minutes</b>
	<b>Welcome and Housekeeping</b> <ul style="list-style-type: none"> <li>▪ Welcome and housekeeping</li> <li>▪ Objectives</li> <li>▪ Structure of the course</li> </ul>	
<b>Session 2</b>	<b>Purpose of reviews</b>	<b>15 minutes</b>
	<ul style="list-style-type: none"> <li>▪ Video introduction</li> <li>▪ Discussion</li> </ul>	
<b>Session 3</b>	<b>The manager's preparation</b>	<b>25 minutes</b>
	<ul style="list-style-type: none"> <li>▪ Small group discussion</li> <li>▪ Discussion summary</li> </ul>	
<b>Session 4</b>	<b>Getting people to open up</b>	<b>40 minutes</b>
	<ul style="list-style-type: none"> <li>▪ Video clip</li> <li>▪ Discussion</li> <li>▪ Video clip</li> <li>▪ Summary</li> <li>▪ Exercise</li> </ul>	
<b>Session 5</b>	<b>Facing up to the problem</b>	<b>45 minutes</b>
	<ul style="list-style-type: none"> <li>▪ Video clip</li> <li>▪ Discussion</li> <li>▪ Video clip</li> <li>▪ Summary</li> <li>▪ Exercise</li> <li>▪ Discussion</li> </ul>	



<b>Session 6</b>	<b>Agreeing a plan for the future</b>	<b>45 minutes</b>
	<ul style="list-style-type: none"> <li>▪ Video clip</li> <li>▪ Discussion</li> <li>▪ Summary</li> <li>▪ Exercise</li> <li>▪ Video summary</li> </ul>	
<b>Session 7</b>	<b>The employee's preparation</b>	<b>15 minutes</b>
	<ul style="list-style-type: none"> <li>▪ Exercise</li> </ul>	
<b>Session 8</b>	<b>Action plan</b>	<b>15 minutes</b>
	<ul style="list-style-type: none"> <li>▪ Action plans</li> <li>▪ Course summary</li> </ul>	
<b>Total</b>		<b>3hours 45mins (including breaks)</b>

## SESSION PLAN (DURATION 3 HRS & 45 MINS)

Session Number	Session content	Approx. timing
<b>Session 1</b>	<b>Introduction and objectives</b>	<b>10 minutes</b>
	<b>Welcome and Housekeeping</b> <ul style="list-style-type: none"> <li>▪ Welcome everyone.</li> <li>▪ Ask everyone to introduce themselves (if appropriate).</li> <li>▪ Explain any housekeeping details (e.g. timing, catering, and fire procedures).</li> </ul>	
	<b>Objectives</b> <ul style="list-style-type: none"> <li>▪ Summarise the course objectives               <ul style="list-style-type: none"> <li>▪ understand the purpose of reviews</li> <li>▪ prepare an effective review discussion</li> <li>▪ begin the discussion positively, structure it as it unfolds, end it by agreeing the actions which arise from it</li> <li>▪ cope with awkward situations</li> <li>▪ identify specific actions to improve their review discussions</li> </ul> </li> <li>▪ Explain how you will work together to achieve these. Stress the importance of using discussion to relate the general lessons from the video to participants' own working circumstances.</li> </ul>	
	<b>Structure of the course</b> <ul style="list-style-type: none"> <li>▪ Remind them of the outline programme.</li> </ul>	
<b>Session 2</b>	<b>The purpose of reviews</b>	<b>15 minutes</b>
	<b>Video introduction</b> <ul style="list-style-type: none"> <li>▪ Explain that the video, Performance Review: Code Red, is in a number of sections.</li> <li>▪ Play the first section of the video when Jones is walking down the corridor.</li> </ul>	
	<b>Discussion</b> <ul style="list-style-type: none"> <li>▪ Lead a short brainstorm. Ask participants to brainstorm as many potential benefits of reviews they can think of in three minutes. Then repeat the process for potential drawbacks. Record their ideas on a flipchart.</li> <li>▪ Benefits can include:               <ul style="list-style-type: none"> <li>▪ ability to step back from the day- to-day work</li> <li>▪ training needs identified</li> <li>▪ better teamwork</li> <li>▪ motivation</li> <li>▪ sorting out working relationships</li> <li>▪ feedback for the manager</li> <li>▪ clearer career directions</li> </ul> </li> </ul>	

	<ul style="list-style-type: none"> <li>▪ Drawbacks can include:           <ul style="list-style-type: none"> <li>▪ it takes time</li> <li>▪ it is not easy to do well</li> <li>▪ can damage relationships if done badly</li> <li>▪ difficult to discuss future actions when things are changing rapidly</li> <li>▪ too much paperwork</li> <li>▪ often difficult to measure performance</li> </ul> </li> <li>▪ Conclude this session by defining the purpose of a review.</li> </ul>	
<b>Session 3</b>	<b>The manager's preparation</b>	<b>25 minutes</b>
	<b>Small group discussion</b> <ul style="list-style-type: none"> <li>▪ Divide the group into pairs or threes. Ask them to spend 10 minutes discussing what managers should think about when preparing to review one of their team.</li> </ul>	15 minutes
	<b>Discussion</b> Record the group's ideas on a flipchart. Highlight any important points you think they may have overlooked. Their answers may include: <ul style="list-style-type: none"> <li>▪ What was agreed at the last review? Check the record.</li> <li>▪ The employee's work over the review period (not just last week!). What has gone well? Why? What has gone less well? Why?</li> <li>▪ The employee's strengths and weaknesses.</li> <li>▪ Any significant changes in the employee's job. Check the job description.</li> <li>▪ Any factors which made the employee's job harder over the past review period (Resources? Support from others? Working relationships? Unforeseen crises? Policy? etc.).</li> <li>▪ Possible further training and development needs.</li> <li>▪ What the manager particularly wants the employee to achieve in the next review period.</li> <li>▪ Arrangements for the discussion (privacy, appropriate venue, adequate time, paperwork, sufficient notice for the employee to prepare).</li> </ul>	30 minutes
<b>Session 4</b>	<b>Getting people to open up</b>	<b>40 minutes</b>
	<b>Video clip</b> Explain that you are going to show a short section of the video which shows how not to start a discussion with someone who is nervous about speaking her mind. Ask participants to pay particular attention to what the manager, David, does wrong.  Play the David–Maxine discussion up to the point at which she gets zapped by Jones.	
	<b>Discussion</b> Lead a short discussion of what David did wrong. Answers might include: <ul style="list-style-type: none"> <li>▪ he was in too much of a hurry</li> <li>▪ he didn't look at her and so missed her unhappy body</li> </ul>	

	<p>language</p> <ul style="list-style-type: none"> <li>▪ he had assumed everything was all right</li> <li>▪ he didn't listen</li> <li>▪ he dismissed her concerns. Saying 'don't we all' is the worst way to respond when someone tells you how she is feeling</li> </ul>	
	<p><b>Video clip</b>          Show the second part of the David–Maxine discussion, in which he gets it right.</p>	
	<p><b>Summary</b>          Revise the four key learning points from this section of Performance Review: Code Red.</p> <ul style="list-style-type: none"> <li>▪ <b>An informal, unhurried atmosphere.</b> Rapport building is very important, particularly with shy people. The ritual cup of coffee (or grape!) and some unthreatening, casual chat are important scene-setting activities.</li> <li>▪ <b>Praise and encourage.</b> People like Maxine sometimes convince themselves that the review is going to be an unpleasant experience. It is important to change their perception early on by congratulating them for their good work.</li> <li>▪ <b>Probe and listen.</b> Good managers ask open (how, what and why) questions to get the person talking, then probe for more information ('tell me a bit more about...') and finally ask closed questions to confirm agreement and understanding.</li> <li>▪ <b>Give time to talk.</b> Advise the group not to be in too much of a hurry. People, particularly shy ones, need time to think. Silence, a friendly facial expression and, if necessary, encouraging prompts ('take your time') will produce answers which rushing the employee will not.</li> </ul>	
	<p><b>Exercise – Tell us about yourself</b>          Explain that this exercise is called 'Tell us about yourself'. It provides practice in questioning and listening. Divide participants into groups of, ideally, three. If necessary, use groups of four.</p> <p>It is your job to keep an eye on the time and tell the groups when each five minute questioning period is over.</p> <p>After 15 minutes are up, stop the exercise and lead a short discussion about how it went. Stress the importance of using the right question for the right purpose at the right time.</p> <p>Instructions in the back of this guide.</p>	
<b>Session 5</b>	<b>Facing up to the problem</b>	<b>45 minutes</b>
	<p><b>Video Clip</b>          Explain that you are going to show a short section of the video</p>	

	<p>which shows how not to criticise someone, particularly if they are as touchy as Tracey! Ask participants to pay particular attention to what the manager, Emma, does wrong.</p> <p>Play the Emma–Tracey discussion up to the point at which Tracey storms out of Emma’s office and gets zapped.</p>	
	<p><b>Discussion</b></p> <p>Lead a short discussion of what Emma did wrong. Answers might include:</p> <ul style="list-style-type: none"> <li>▪ she didn’t praise Tracey for what she had done well.</li> <li>▪ her criticism took Tracey by surprise.</li> <li>▪ she made remarks about Tracey’s personality (“You’re slapdash”), instead of describing what she had done – her performance.</li> <li>▪ she had no examples to back up her generalisations (“I’m not happy about your work... Well, all of it really.”).</li> <li>▪ her body language was a mixture of belligerent and nervous, instead of being open and direct.</li> <li>▪ she told Tracey about her behaviour, instead of asking her.</li> </ul>	
	<p><b>Video Clip</b></p> <p>Show the second part of the Emma–Tracey discussion, in which she gets it right.</p>	
	<p><b>Summary</b></p> <p>Go through the four key learning points from this section of Performance Review: Code Red.</p> <ul style="list-style-type: none"> <li>▪ Performance, not personalities. Remind the group that the review is not therapy and they are not psychiatrists! Whatever we think about someone’s personality, we are unlikely to be able to change it in one relatively short discussion. What we can change is behaviour, which means concentrating on performance.</li> <li>▪ Warn the group to watch out for the word ‘attitude’. Before you criticise someone’s attitude you must be quite clear what, specifically, you don’t like and how that shows up in practice, with examples.</li> <li>▪ Use positive language. Remind the group about Emma saying:  <i>“between you and me we have got to get your reliability up to the same standards as the rest of your performance areas.”</i></li> <li>▪ If a person’s performance was universally awful, you would be having a disciplinary interview with them, rather than reviewing them.</li> <li>▪ Encourage self-appraisal. It is much less threatening to ask people what they think about their performance than simply telling them what you think. Of course, they will want your opinion. But if you have heard what they have to say first, you will often find that, when it is your turn, you</li> </ul>	

	<p>can put a positive slant on what they have said (“Sure, it’s a pity you didn’t quite hit the target, but think of the obstacles you had to overcome. What do you think you learned from the experience?”).</p> <ul style="list-style-type: none"> <li>▪ No surprises! At least, no negative ones. Tell the group that if something is going wrong they must address it at the time. They can certainly review progress on areas of improvement at review time, but saving up bad news is simply asking for the reaction that Emma got from Tracey.</li> </ul>	
	<p><b>Exercise – Fail to prepare, prepare to fail!</b>          Divide the group into pairs. Leave them to discuss the short case study for fifteen minutes.</p> <p>Instructions are in the back of this guide.</p>	
	<p><b>Discussion</b>          Find out what ideas the small groups have had. These should include:</p> <ul style="list-style-type: none"> <li>▪ Collect information about:             <ul style="list-style-type: none"> <li>▪ his sales record</li> <li>▪ specific examples of times when he has handled customers well</li> <li>▪ previous occasions on which you have mentioned to him the problems of his not contributing to the team effort (if there aren’t any you are in trouble!)</li> <li>▪ specific examples of the behaviour you want him to change</li> </ul> </li> <li>▪ Prepare questions, such as:  <i>‘We’ve talked about being a bit more of a team player. How do you think that’s going? What have you tried to change?’</i></li> <li>▪ Think about what to say when introducing the criticism. For example:  <i>‘You’re great with customers and I’m sure neither of us would like to see your sales figures fall off. I have to say though that I’m still concerned about how customers get shared out between you and your colleagues. We’ve talked about this before. How do you see this issue?’</i></li> </ul>	
<b>Session 6</b>	<b>Agreeing a plan for the future</b>	<b>45 minutes</b>
	<p><b>Video clip</b>          Explain that in this case you are going to show the whole of the third example, the review discussion between Don and Alan. Ask the group to note what they think is important as they watch.</p> <p>Play the whole of the Don–Alan sequence.</p>	
	<p><b>Discussion</b>          What did Don do wrong? Answers should include:</p>	

	<ul style="list-style-type: none"> <li>▪ He had no structure for the discussion.</li> <li>▪ His criticisms were vague. There is a classic conversation which happens all too often in real reviews:           <ul style="list-style-type: none"> <li>▪ Don: Why don't we discuss your rejection rate?</li> <li>▪ Alan: What about it?</li> <li>▪ Don: It's too high.</li> <li>▪ Alan: how high?</li> <li>▪ Don: well, er, high enough to be a problem.</li> </ul> </li> <li>▪ He allows himself to be distracted. The argument about advertising is a complete red herring.</li> <li>▪ Even when he starts to get the discussion right, he still forgets to summarise and agree what Alan will do as a result.</li> </ul>	
	<p><b>Summary</b>        Go through the four key learning points from this section of Performance Review: Code Red.</p> <ul style="list-style-type: none"> <li>▪ <b>Structure the interview.</b> Decide on the main performance areas you want to talk about. These may come from the job description, as in Alan's case, or they may be objectives you have agreed at the beginning of the review period, or they may be a set of competences</li> <li>▪ <b>Focus on the facts.</b> This means two things. First, resisting the temptation to get sucked into irrelevant discussions. When Alan tries to go on about getting rid of Charlie the Chicken, Don says: <i>"No, I mean what can you do personally?"</i> Secondly, nail down generalisations. For example, when Alan starts to blame maintenance for not keeping appointments, Don says:           <ul style="list-style-type: none"> <li>▪ Don: Can you give me some dates and times?</li> <li>▪ Alan: Well, last Thursday for instance</li> <li>▪ Don: Last Thursday?</li> <li>▪ Alan: Well, they only turned up about three hours late.</li> </ul> </li> <li>▪ <b>Agree measurable targets.</b> This is reasonably easy if, as in the video, they can be easily quantified. Tell the group that one of the benefits of a review is that it gives bosses and their team members the opportunity to talk about how they measure the achievement of targets, such as improving communication, which don't come with numbers attached</li> <li>▪ <b>Set review dates.</b> Remind the group that a review is not supposed to be merely a once a year chore. To get the maximum benefit from it, it should be part of a never-ending process of improvement. That means agreeing targets, reviewing them and learning from how they have gone.</li> </ul>	
	<p><b>Exercise</b>        Hand out copies of a job description of a typical employee in the organisation or, a job description for a role common to the</p>	

	<p>majority of the delegates. Also hand out an imaginary description of the employee to be reviewed, which describes any areas of weakness or strength in their performance that will need special discussion. Ask delegates, working in pairs, to draw up an agenda for the review meeting.</p> <p>Ask them to put these on sheets of flipchart. Allow 15 minutes for them to complete this exercise.</p> <p>Display the flipcharts side by side. Ask participants to explain their reasoning, particularly where one approach differs from the others.</p>	
	<p><b>Video summary</b>          Pull together the lessons from this and the previous two sessions by playing the short summaries which follow the Don–Alan section.</p>	
<b>Session 7</b>	<b>The employees preparation</b>	<b>15 minutes</b>
	<p><b>Exercise</b>          Go through the employee’s preparation checklist. Stress that participants can use this both to prepare their own review with their bosses and also to encourage their team members to come properly prepared to review discussions.</p> <p>Outline in the back of this guide.</p>	
<b>Session 8</b>	<b>Action plan</b>	<b>15 minutes</b>
	<p><b>Action plans</b></p> <ul style="list-style-type: none"> <li>▪ Ask participants to complete an action plan. Give them about ten minutes to do so. The three sections they will need to fill in are:             <ul style="list-style-type: none"> <li>▪ Preparing the reviews</li> <li>▪ During the review discussion</li> <li>▪ Following up the review discussion</li> </ul> </li> <li>▪ Take a few examples of intended actions from the group</li> </ul>	
	<p><b>Course summary</b>          Summarise the ground you have covered</p> <ul style="list-style-type: none"> <li>▪ Purpose</li> <li>▪ Preparation</li> <li>▪ Opening, structure, ending</li> <li>▪ Awkward situations and people</li> <li>▪ Your actions</li> </ul> <p>Thank the group for their participation and bring the course to a close.</p>	



## GROUP EXERCISES

### Exercise 1

#### Tell us about yourself

- One member of the small group will be interviewed by the other two (or three).
- The objective is to find out as much as possible about the interviewee in 5 minutes, using the following strict questioning sequence:
- Interviewer A asks an open question.
  - The interviewee responds
  - Interviewer B asks a probing question, based on that response
  - The interviewee responds
  - Interviewer A (or C) asks a closed question to confirm understanding
  - Interviewer B asks an open question
  - ... and so on...
- After 5 and 10 minutes, the roles rotate.

### Exercise 2

#### Fail to prepare, prepare to fail!

Your task is to discuss how you would prepare the review interview with the sales person described below. For example:

- What information would you collect?
- What questions would you prepare?
- How would you introduce the criticism of this otherwise excellent employee?

#### Manager's brief

You are the Branch Manager of your company's Borchester shop. You have a total of ten sales assistants working for you. You will shortly be holding a review meeting with one of them. This person has been with your company for just over a year. He is hard working and you have a reasonably friendly relationship with one another, despite the fact that he is rather a 'loner'.

He is very commercially aware and excellent at selling. In fact he has the best sales record of all your sales assistants and you would not want to do anything that might diminish this aspect of his performance.

However there is a problem. You are conscious that he is not too popular with his colleagues on the sales floor. He can seem determined to get to every sale first, he is reluctant to help his colleagues, and he plays little part in team meetings. He is not exactly a team player!

You want to raise this aspect of his attitude to the job during the review discussion so that you can agree how, specifically, he might improve.

**Exercise 3****Employee's preparation****The Past**

1. Your previous review  
Get a copy of the notes from your previous review. What did you agree at that discussion?
2. Your performance  
Make sure you think about this over the entire review period (not just last week!). What has gone well? Why? What has gone less well? Why?
3. Your job  
Have there been any significant changes? Check your job description.
4. Difficulties  
Are there any factors which made your job harder over the past review period (Resources? Support from others? Working relationships? Unforeseen crises? Policy, etc.?)

**The Present**

1. Strengths and weaknesses, likes and dislikes  
What do you think you are best at? Least good at? What do you like most about your job? What do you dislike most?
2. Issues  
What are the most important issues you want to raise with your boss at the review?

**The Future**

1. Training and development  
What further training and development would you like?
2. The next review period  
What do you particularly want to achieve in the next review period?
3. Your career  
Do you want to discuss this with your boss? If so, what do you want to say?