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Tips for conducting a year-end review

Follow these tips for structuring and conducting your [year-end reviews to get the most out of the session](#) with your employees.

Ask employees about their well-being

Start the session on a compassionate note by [checking in on your employee's](#) mental and physical well-being. If you chat with them frequently and know they've recently gone through a significant event in their personal life that they shared with you, you can ask them how they're doing. Talk to the employee about how their workload has affected their mental health and if they feel like they have a healthy work-life balance. Employees who feel like their employers genuinely care about their well-being are more likely to remain loyal to the company long-term and put in more effort.

Look at year-on-year growth

During the review, you'll likely discuss the employee's achievements and strengths or weaknesses in various areas of the job. Try to focus on the positives at the beginning of the meeting, and if you're discussing weaknesses, be sure to compare the employee's performance only to their own in the last year, not to another staff member. Look at the current performance review against last year's, and if the employee has shown growth in certain areas, highlight those achievements and celebrate them with the employee. Also, look at goals the employee set for themselves in previous meetings and see how close they've come to achieving them.

Start with an overview

Hosting a good year-end review requires careful planning by the employer because your meeting should have an overarching theme. Think of something the employee has done well in the past year or where they're trying to take their career in the future and focus the meeting around this. Link their strengths, achievements and areas for improvement back to this idea for a cohesive session with motivating and useful feedback. Employees will appreciate the meeting more if they walk away from it feeling like they're moving forward in their careers and you're supporting them.

Work with them on setting goals for the future

Talk to the employee about where they see themselves in 6 months, a year and 5 years during the year-end review. Let them be honest about their dreams for the future and career objectives. Then, help them chart the path to get there successfully by setting SMART goals. SMART goals are specific, measurable, achievable, relevant and time-bound. These goals mean there should be a clear deadline for meeting the objective, and they should relate to the next steps this person wants to take in their career.

Let them provide feedback

During the end-of-year review, it's also critical to give employees a chance to provide feedback on your performance. Having an opportunity to comment on your management style shows the employee you value their opinion. It also gives you the chance to see what aspects of your approach are resonating with your staff and where you might need to approach things differently in the next year to achieve better results.

Don't just listen to humor employees; if they provide [constructive feedback](#), take it seriously. Do your best to demonstrate that you heard their concerns or requests and incorporate them into how you manage them moving forward.

Year-end review examples for managers to use

In addition to having a meeting, you will create a document to reference during the session that's a formal record of the employee's performance. They can take a copy with them after the meeting, while another copy should remain in their file. Refer to these year-end review examples for ideas on how to format and write feedback for your team.

Sample review section: communication

John has improved his communication skills since our 2021 performance review meeting. He responds to emails and text messages promptly and uses tactful language to present new ideas or alternative solutions.

Despite the improvement in John's communication frequency and diligence since the last review period, he still has room to grow. John would benefit from taking ownership of communication errors rather than engaging in a defensive response. Taking the initiative to clarify a misunderstanding as soon as it occurs will be a critical step for John in the coming year.



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The key takeaway for employers: Providing critical feedback on a performance review is expected and acceptable. However, be thoughtful about where and how you include it. Using the “sandwich” method can soften the criticism by first sharing something positive about the employee, then your criticism and following it with steps for the future.

Sample review section: engagement

Jane remains an important part of our organization and is always eager to be involved in various project teams. She stays focused during the workday and can always be counted on to have updated information about the status of a project.

During meetings, Jane struggles to engage with her peers, often withholding her opinion in a group setting. Her exceptional ideation and problem-solving skills make her valuable to the team, and I strongly encourage her to step outside her comfort zone and share these ideas during meetings.

The key takeaway for employers: Provide encouragement as a way to give feedback. While you’re communicating an area where the employee is underperforming, the comment is softened by the encouragement and sense of confidence you have in their ability to improve.

Sample review section: quality of work

John continues to deliver high-quality work the majority of the time. He has excellent attention to detail and always asks for clarification to ensure the content of the project is correct. When faced with a tight deadline, John sometimes rushes to complete the work and overlooks steps related to the final deliverables. This is an area where we can set goals for improvement.

The key takeaway for employers: You can use the performance review sections to identify areas for improvement and specify that you have goals in mind for the employee to achieve. Setting goals can help them better accept criticism because they don’t fear losing their job knowing that you’re on their team and rooting for their professional development.

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