



# Performance Review Planning Worksheet

## Step 1. Strategic Context

What were this leader's primary goals, and how do they connect to broader business priorities?

## Step 2. Evidence & Insights

What are 2–3 patterns in results or behavior (positive or negative)?  
What feedback themes have emerged from peers/teams?

## Step 3. Anticipate Their View

Where might this leader over- or under-rate themselves?  
What are they likely to see as their biggest challenge?

## Step 4. Craft Your Message

Key recognition points:

Key development feedback:

One specific example for each.

## Step 5. Discussion Flow

Opening line to set alignment:

Transition to development:

Closing with next steps / forward focus:

## Step 6. Reflection

What's the toughest part of this conversation for me?

What's one commitment I'll make to prepare fully?