

Standard Operating Procedure (SOP)

Conducting the Formal Performance Review Meeting

This SOP details the process for **conducting the formal performance review meeting**, including preparation steps, setting meeting objectives, delivering constructive feedback, discussing employee achievements and areas for improvement, setting future goals, and documenting the outcomes. The aim is to ensure a structured, transparent, and productive evaluation that supports employee development and organizational growth.

1. Purpose

To provide clear guidelines for managers and supervisors on conducting formal performance review meetings, ensuring consistency, fairness, and a focus on employee growth and organizational objectives.

2. Scope

This SOP applies to all managers and employees participating in the formal performance review process within the organization.

3. Responsibilities

- **Managers/Supervisors:** Prepare and conduct performance review meetings, provide feedback, set goals, and document discussions.
- **Employees:** Participate actively in discussions, provide input, and collaborate on goal setting.
- **HR Department:** Support the process by providing tools, forms, and guidance as needed.

4. Procedure

1. **Preparation (At least 1 week before the meeting)**
 - Review employee's job description, previous performance reviews, and goal progress.
 - Gather performance data from relevant sources (self-evaluations, peers, clients, metrics).
 - Identify key achievements and areas needing improvement.
 - Schedule the meeting with sufficient notice and share the agenda and any relevant materials with the employee.
2. **Setting Meeting Objectives**
 - Clearly define and communicate the objectives of the review meeting such as evaluating performance, discussing achievements, identifying areas for development, and establishing new goals.
3. **Conducting the Meeting**
 - Welcome the employee and explain the review process.
 - Encourage an open, two-way dialogue.
 - Discuss key achievements, strengths, and contributions.
 - Provide constructive feedback on areas for improvement, supported by specific examples.
 - Allow the employee to share their perspective and ask questions.
4. **Setting Future Goals and Development Plans**
 - Collaboratively set SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound) for the next review period.
 - Identify support, training, or resources required for development.
5. **Documenting the Meeting Outcomes**
 - Record key discussion points, agreed goals, and development actions in the performance review form.
 - Ensure both manager and employee sign off on the documented outcomes.
 - Submit the completed review form to HR for recordkeeping.
6. **Follow-Up**
 - Monitor progress on agreed actions and goals.
 - Schedule regular check-ins to provide ongoing feedback and support.

5. Supporting Documents & Tools

- Performance review form
- Employee self-assessment template
- Goal-setting worksheet
- Manager's checklist

6. Revision History

Version	Date	Description	Author
1.0	2024-06-XX	Initial SOP release	HR Department