



6 Employee Feedback Checklists for Talent Development



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by Paycor



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EXECUTIVE SUMMARY

From Millennials who want more and more frequent feedback to the new-to-the-workforce Gen Z who wonder why the heck they have to wait a whole year for feedback, the often-dreaded formal annual review process is quickly becoming a dinosaur.

Instead of jotting down (and often forgetting) employee performance notes throughout the year, why not consider using weekly, monthly and quarterly feedback sessions. With so many employees now working remotely, keeping a finger on the pulse of your people is more important than ever, so once a year will no longer cut it.



Use the templates in this guide to build a program of productive in-office and online conversations.





How Great Leaders Give Feedback

WHAT WE KNOW:

Here's what we know for sure: the annual performance review isn't working, and employees crave more consistent feedback.



One in 5 employees
say they'd rather call in
sick than have an annual
performance review.

(TriNet and Wakefield Research)

65%

of employees want
more feedback

(Global Culture Study)

69%

say they'd work harder if their
efforts were better recognized

(OfficeVibes Study)





WHERE IT GETS COMPLICATED:

Unfortunately, many managers aren't exactly sure how to give feedback, how to capture it or how to make communication with their employees more meaningful. **The templates in this guide will give you a structure for productive conversations.** Before we dive into them though, let's talk about feedback fundamentals.

FEEDBACK BEST PRACTICES:



- **Give feedback at the right time**

Sometimes, "when" is more important than "what." A hint: immediately after a presentation might not be the best time to give "constructive criticism." People need time to process. Take notes and give feedback when the time is right for your employee.



- **Let your direct reports own their projects**

Taking responsibility is a great way to learn. Managers need to have faith that even though an employee may not be totally ready, the chances of growth are often greater than the risks of failure. Giving your direct reports the opportunity to learn by owning is a prerequisite to talent development.

FEEDBACK BEST PRACTICES:



- **Teach employees how to solve problems**

Forgive the cliché, but we know this is true: give a person a fish and they'll eat for a day. Teach them to fish and they'll eat for the rest of their lives. As a manager, it's often tempting to do an employee's job for them. It takes patience to let an employee learn themselves. When it comes to feedback, asking the right questions can be more helpful than having all the answers.



- **Provide effective peer-to-peer feedback**

This has to be done carefully, though. As a manager, you have to be on the lookout for co-worker bias. If done well, peer feedback can be illuminating and a refreshing break from the routine of the manager always giving the feedback.



- **Start with a question**

Open up with a question such as "How do you think you are doing on this task?" It provides context to start with and makes the person feel included in the conversation. Feedback should be a conversation, not a one-way task-list.





FEEDBACK BEST PRACTICES:



- **Bring an objective perspective**

Be careful to separate emotions from your feedback. Feedback is for helping individuals improve. It is not an outlet to rant.



- **Be specific with your feedback**

Each feedback session should be about a focused topic. Don't bring in extra people if it's unnecessary. Feedback should be between two individuals, about a particular aspect or action item.



- **Go in with realistic expectations**

Everyone is at a different position in their career. Be mindful to set expectations based on previous employee feedback sessions. Don't expect everyone to be at the same level at the same time. Feedback is about continuous growth, so be empathetic.



- **Change takes time**

Build a transparent culture with open communication. Leading by example also means being open to help and receiving feedback at any time. Continuity is key.

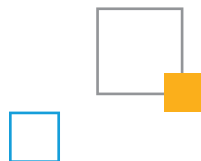


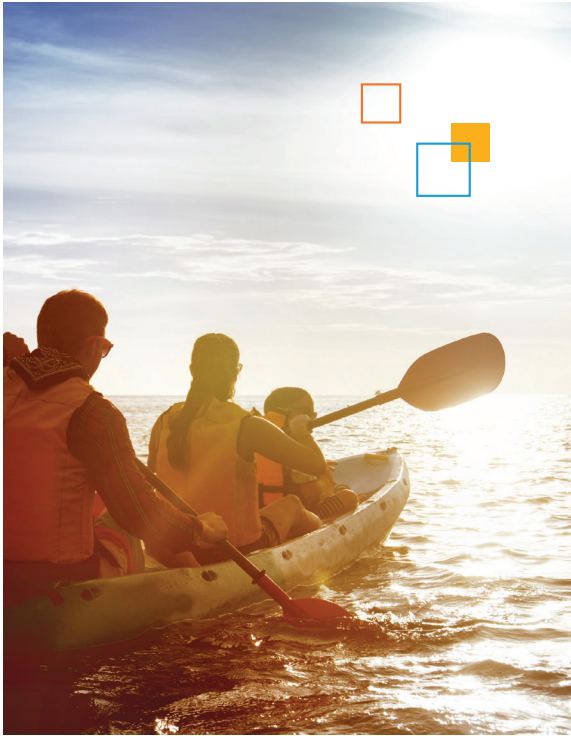
How to Develop Talent in a Virtual Environment

REMOTE EMPLOYEE FEEDBACK:

The pandemic meant that many organizations joined the remote-work revolution a lot faster than they ever planned. The reality is, it's been a challenge. **Leaders have realized that top performers in the workplace can easily become isolated and disengaged when working from home.**

It's not true for everyone—there are many introverts who thrive working remotely. What's certain, though, is that effective remote leadership requires new thinking about feedback.





HERE'S WHERE TO START:



• Get the tech you need

When it comes to remote technology, it pays to go with the more reliable option. Dodgy Wi-Fi can kill engagement in seconds. Meetings don't have to be face-to-face, but if one of you is heavily pixelated you might as well give up. Non-verbal cues and body language are more important than many imagine, even on video calls.



• Keep collaborating

Working in teams remotely can be a hassle, but don't take the easy option. Connection takes effort. And it may not be as organic as in person, but teamwork and cross-functional connection drives business success and employee engagement.



• Double down on 1-on-1s

Frequent individual meetings between manager and employee are at the heart of the remote work experience. In the office, you know you'll see each other. Remotely, you can't leave it to chance—put it down in the calendar. Don't restrict the topics of conversation: if something's bothering them outside of work, let them explain.



• Pay attention

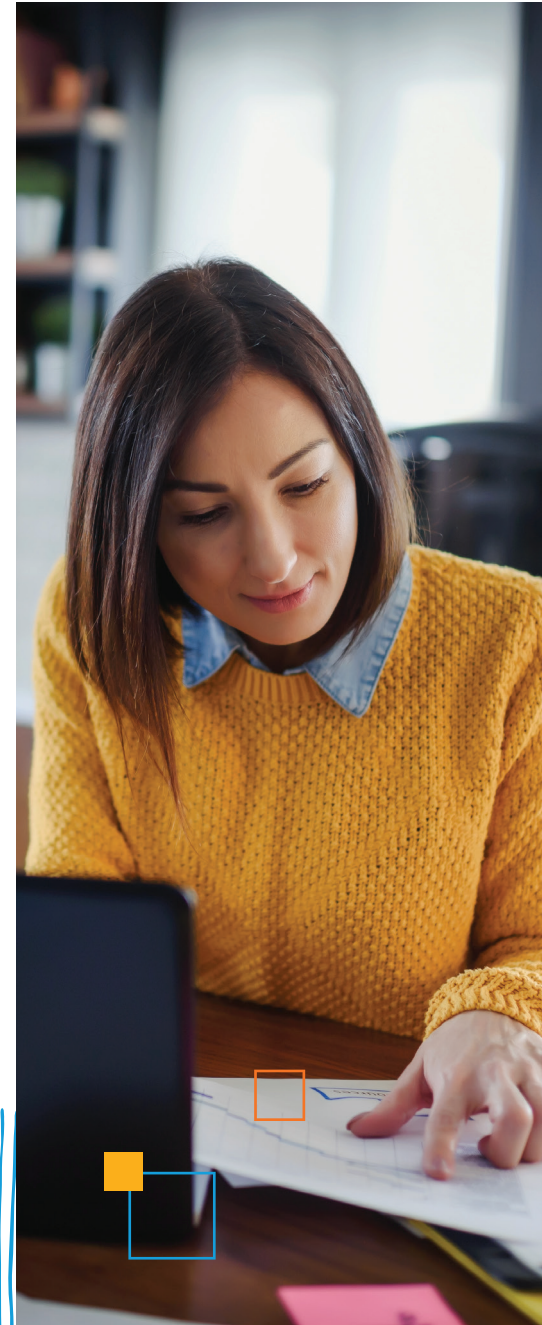
The same rules of politeness apply remotely as they do in-person. Video calls aren't just an excuse to check your emails—an employee might not mention it, but they can tell. When you commit time, you should also commit concentration.



What Makes a Remote Leader Successful

It's pretty difficult to set metrics around interpersonal relationships, but managers can use this checklist to determine how strong of a rapport they have with their direct reports:

- ☐ Do you know what annoys your employee?
- ☐ Who do they like working with? Who don't they like working with?
- ☐ What exactly do they do in their role?
- ☐ How do they like to be rewarded (e.g., a simple "thank you" or a gift card)?
- ☐ Can you tell when something is upsetting them or causing conflict?
- ☐ What is the name of their significant other? Their children?
- ☐ Are you familiar with their personal core values (e.g., generosity, faith, self-reliance)?





TEMPLATE #1:

Employee Reflection

Instructions: Managers should encourage employees to complete these questions on their own time. In a separate meeting, review the answers together and align on some next steps for improvement. Follow-up in future scheduled meetings.

- ☐ Which responsibilities do you view as most important and why?
- ☐ What specifically has helped your growth? What has hindered it? How can I help?
- ☐ What are your stand-out contributions to the rest of the team? Anything outside your scope-of-work?
- ☐ What are your current professional development goals?



TEMPLATE #2:

Co-Worker Review

Instructions: Managers can use this template to gather feedback about employee performance from their teammates. Peer feedback can help reveal strengths or opportunities for improvement that might not be evident to managers. It's important to be aware of any interpersonal conflicts that might affect the outcome before using this type of review.

- ☐ What does (co-worker) excel at?
- ☐ Tell me one thing you think (co-worker) can improve on.
- ☐ What's your impression of how (co-worker) gets along with their stakeholders?



TEMPLATE #3:

Professional Development

Instructions: Use this template to better visualize how your employee's goals, strengths and skills align with their role. Spend time discussing their career path based on their responses. Use this template to compare results with responses.

Align:

- ☐ Which strength is underused in your current job?
- ☐ What are the career goals that are most motivating?
- ☐ Do you think your job aligns well with your personal values?

Develop:

- ☐ What barriers are getting in the way of you meeting your goals?
- ☐ What can I do to help you reach your professional goals?

Train:

- ☐ What skills or training would help you succeed?
- ☐ What skills or training would help you be more efficient?





TEMPLATE #4: Weekly Check-In

Instructions: Ask these questions to help gather information and provide feedback to employees in weekly 1-on-1 meetings.

- ☐ What's going well in your role? Any big wins this week?
- ☐ What challenges are you facing and how can the team help?
- ☐ What are the most important things that you did this week?
- ☐ Is there anything else that you need to talk about for next week?

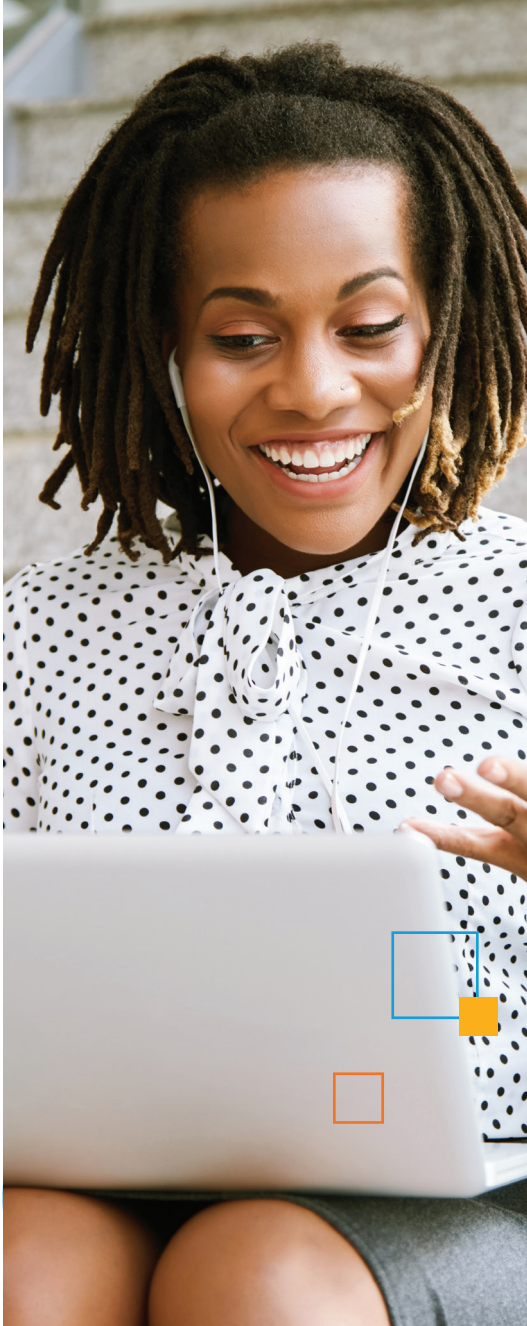


TEMPLATE #5: Monthly Check-In

Instructions: Ask these questions to help gather information and provide feedback to employees in monthly 1-on-1 meetings.

- ☐ What surprised you in the past 30 days that you'd like to share?
- ☐ What do you believe was your biggest success this month based on your priorities?
- ☐ Which tasks were most challenging for you this month and why?
- ☐ How can I empower you to continue to be successful?





TEMPLATE #6:

Quarterly Check-In

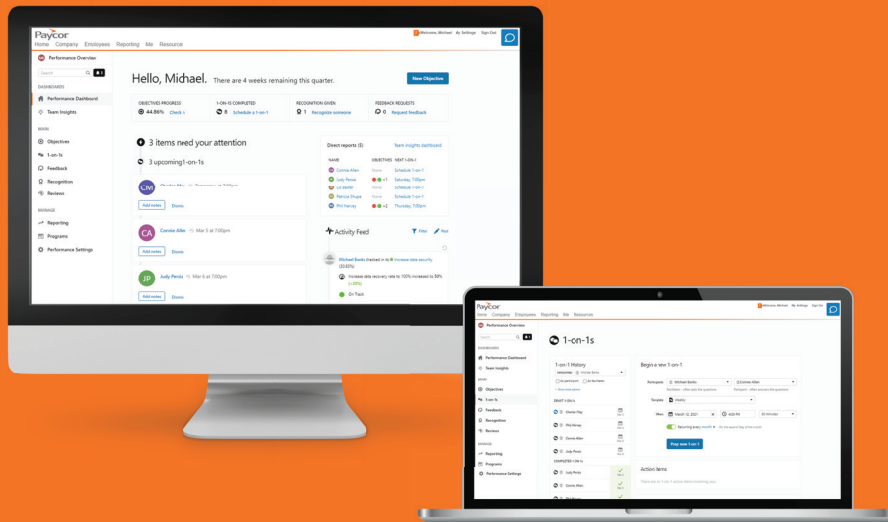
Instructions: Ask these questions to help gather information and provide feedback to employees in quarterly 1-on-1 meetings.

- ☐ What are you proud of in this quarter? What is the biggest lesson you've learned this quarter?
- ☐ What were your biggest barriers to success, and how can I help you overcome them next quarter?
- ☐ What are your goals for next quarter?
- ☐ What would you like to do less of? What would you like to do more of?
- ☐ What feedback do you have on our processes that you'd like to share?
- ☐ Are there any resources that you need from me/the team to succeed further or grow your skills?



How Paycor Helps

Paycor Talent Development eliminates the frustration, complexities and repetitive tasks HR leaders encounter when managing performance evaluations. Instead of manually collecting feedback, capturing data in spreadsheets and analyzing the results, we make the process more efficient by automatically compiling data from a selected time frame and building a report for you. With automated workflows, prompts, tasks and notifications, admins and managers can break free from messy spreadsheets—and get time back to focus on more impactful conversations and development activities.



About Paycor

Paycor builds HR software for leaders. Our Human Capital Management (HCM) platform modernizes every aspect of people management, from the way you recruit, onboard and develop people, to the way you pay and retain them. But what really sets us apart is our focus on business leaders. For 30 years, we've been listening to and partnering with leaders, so we know what you need: HR technology that saves time, powerful analytics that provide actionable insights and a Personalized Support Model. That's why more than 40,000 organizations nationwide trust Paycor to help them solve problems and achieve their goals.

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