



Your simple appraisal checklist

Appraisals don't need to be daunting. With a little preparation and the right approach, they can become one of your most useful people tools. **Use this checklist to guide you through each stage - from prep to follow-up.**



Before the appraisal

- ☐ **Set the date early**
Give plenty of notice so there's time to prepare and no last-minute stress.
- ☐ **Agree on what you'll cover**
Share a simple agenda - think goals, feedback, development. Make it clear and easy to follow.
- ☐ **Gather notes and evidence**
Look at performance data, feedback, and previous goals. Encourage your employee to do the same.
- ☐ **Choose the right space**
Make sure it's private, quiet and free from distractions - whether that's in person or online.

During the appraisal

- ☐ **Start with a check-in**
Ask how they're feeling about their role. Let the conversation flow naturally.
- ☐ **Review the year (or period)**
Talk through wins, challenges, and progress against goals. Keep it balanced and fair.
- ☐ **Give and ask for feedback**
Make time for two-way feedback. It should feel like a conversation, not a critique.
- ☐ **Set new goals together**
Make sure goals are clear, achievable, and linked to business priorities. Write them down there and then.
- ☐ **Talk development**
Ask what they'd like to learn or improve - and explore how you can support that.

After the appraisal

- ☐ **Write up a summary**
Keep it short and action-focused. Use your appraisal software to log it securely.
- ☐ **Follow up with agreed actions**
Book any training, share resources, or schedule check-ins.
- ☐ **Keep the conversation going**
Appraisals shouldn't be done just once a year. Use 1:1s to check in on progress regularly.

Next steps

Want to make appraisals more useful – and less stressful?

Get more guidance on supporting your team in our Line Manager Essentials training.

And when you're ready to put it all into practice, **Breathe's performance tools** help to:

- ✓ **Log appraisals** – so every conversation and achievement is recorded.
- ✓ **Track goals** – making it easy to see progress and celebrate success.
- ✓ **Follow up** – ensuring nothing important slips through the cracks.



[See how Breathe supports performance management](#)