

Performance review template

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At Charlie, we believe the most crucial part of any review process is the conversation between manager and team member – that conversation is the single greatest factor in deciding whether a review process is useful and productive. That's why we've built Charlie's review process in a way that prioritises meaningful conversations. Here's the review process we use at Charlie:

1. Team member completes their own self-feedback

First, we ask our team to reflect on the progress they've made towards their development goals, and then share these thoughts with their manager via Charlie's Reviews feature.

Example questions

- What progress do you feel you have made towards your development?
- What have you been most proud of achieving?
- Is there anything you wish you'd made more progress on?
- What do you see as being your main focus areas for development over the next 4 months?

2. Their line manager shares their feedback

Next, the line manager will assess their selffeedback. Then, they'll reply with their own feedback and share it with the team member via Charlie.

Example questions

- What progress has this person made towards their development?
- What do you think they should be most proud of?
- What areas could they have made more progress on?
- What do you see as being their main focus areas for development over the next 4 months?

3. Now that it's been prepared for, the review meeting can take place

Asking the team member to reflect on their own development and sharing those thoughts with their manager helps to make this conversation as meaningful and productive as possible.