THE PLAYBOOK

The Check-In

Performance conversations without the annual review theatre. Four quarterly questions, evidence collected while it is accurate, and why pay belongs in a different meeting.

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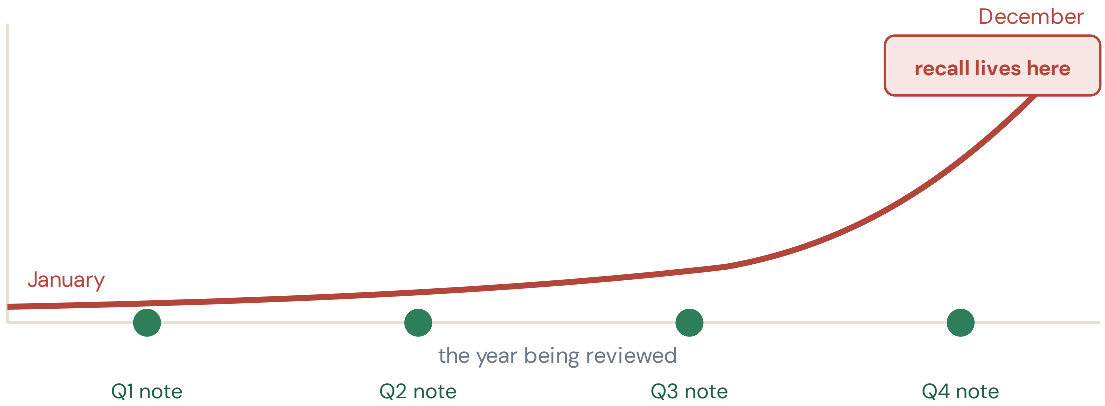
OPENING

Nobody defends the annual review

Ask managers and employees separately what they think of annual performance reviews and you get a rare consensus. Both sides find them uncomfortable, both find them inaccurate, and both do them anyway.

The usual response is to redesign the form. The form is not the problem.

WHAT A MANAGER CAN RECALL AT REVIEW TIME



Four short notes written when things happened describe a year. Recall in December describes November, plus one incident

Figure: this is not a failing of managers. It is what memory does, and it is why annual reviews feel arbitrary.

An annual review is a memory exercise, and memory covers about two months plus one incident that stuck. Whatever happened in March is gone, unless it was dramatic, in which case it is over-weighted.

This is not a failing of conscientiousness. It is what recall does, and no amount of preparation in the week before fixes it, because the information was never captured.

The fix is not a better annual conversation. It is four short ones, written down while they are accurate, which then assemble into the annual one automatically. That is the whole method and the rest of this is detail.

CHAPTER 1

Why annual reviews describe two months

Three specific distortions, all of them predictable.

Recency. The last quarter dominates. Somebody who had a difficult October and an excellent February gets a review about October.

Salience over frequency. One memorable incident outweighs eleven months of steady competence, in both directions. The person who rescued something dramatic is remembered; the person who quietly prevented three similar situations is not, because nothing happened.

Reconstruction. Asked to assess a year, people build a narrative and then find evidence for it. This is why reviews often feel arbitrary to the recipient: the conclusion was formed first and the examples were retrieved to support it.

> **The problem is not that managers are unfair. It is that they are being asked to do something memory cannot do.**

Everything else in this playbook follows from accepting that. If the evidence is not captured when it occurs, the annual conversation will be a reconstruction, however good the intentions of the person conducting it.

CHAPTER 2

What a check-in is for

A quarterly check-in is not a mini review. It has a different purpose and confusing the two is why most attempts feel like extra admin.

It exists to capture, not to judge. Twenty minutes, four questions, both sides writing a few lines. No rating, no score, no form that goes anywhere else.

It is not the one-to-one. The weekly one-to-one is about the work in front of you. The quarterly check-in is about the shape of the role and the direction. Running the second inside the first turns every week into an assessment, and people stop raising things.

It should be short and slightly boring. If it takes ninety minutes and requires preparation, it will slip and then stop. Twenty minutes, four questions, in the calendar for the year in advance.

BOTH SIDES WRITE

The manager writes a few lines and so does the person. Two perspectives captured at the same moment is considerably more useful at year end than one, and it removes the dynamic where the record is something done to somebody.

CHAPTER 3

The four questions

The same four, every quarter, which is what makes them comparable across a year.

01 What went well this quarter, specifically?

Both answer. Ask for a thing that happened, not a quality. The answers diverge more than you expect, and the divergence is the useful part.

02 What was harder than it should have been?

Deliberately phrased about the work rather than the person. This surfaces process problems, missing authority and capacity issues that would otherwise show up as performance concerns.

03 What do you want to be doing more of in a year?

Career progression is the most consistently cited reason people leave. Pew Research found 63 percent of those who quit in 2021 named a lack of advancement opportunity. Asking four times a year is most of what a small business can do about that.

04 What do you need from me that you are not getting?

Ask it, then do not defend the answer. If nothing changes after this question is answered honestly twice, it stops being answered honestly.

Then one line agreed for the coming quarter. Not a goal with a number, which belongs elsewhere. One thing to focus on, written in their words.

CHAPTER 4

Separating pay from development

The single most consequential design decision here, and most small businesses get it wrong by combining them for efficiency.

TWO CONVERSATIONS, NEVER THE SAME MEETING

Development	SEPARATE	Pay and level
what is going well		what the role is worth
what is hard		what changed this year
what you want next		what the decision is
what you need from me		and when it takes effect

Run them together and people answer the left column strategically, because the right column is listening.

Figure: mixing these does not save time. It makes the development half unusable.

The reason is behavioural rather than procedural. If the same conversation determines pay, people answer the development questions strategically. Nobody says "this was harder than it should have been" when that might be heard as struggling. Nobody says "I want to move toward operations" when the money is being decided in the same half hour.

So run the pay conversation separately, on its own cycle, and say plainly that it is separate. Different meeting, different month if possible, and no ambiguity about which one is happening.

And be honest about what you can offer. A small business often cannot promise progression on a timeline. Saying so directly is better than implying otherwise, because the implication will be remembered as a commitment and its absence as a broken one.

CHAPTER 5

Writing it down as you go

The mechanism that makes the annual conversation trivial rather than dreaded.

Four sheets a year, per person, in one document. Not four separate files. One rolling document per person, four sections, nothing deleted.

Write during the conversation, not afterwards. Same rule as the one-to-one. Written afterwards means written from memory, at which point you have reproduced the problem at a smaller scale.

Keep it short enough that it is honest. Three or four lines per question. Long entries are performances; short ones are records.

Then the annual conversation reads the document rather than reconstructing the year. Both people arrive having read the same four quarters. The conversation is about what the pattern shows and what comes next, which is a fundamentally different and much better meeting than trying to remember March.

Nobody should be surprised at an annual review. If they are, it means something was noticed and not said, and that is a failure of the process rather than a revelation about the person.

CHAPTER 6

The conversation nobody wants to have

Sometimes the honest answer is that performance is not good enough. The quarterly rhythm makes this better in three ways, and it is worth naming them because avoidance is the default.

It arrives earlier. A concern raised at the first quarterly check-in is a course correction. The same concern raised in month eleven is a decision, and the person can reasonably ask why nobody mentioned it.

It arrives with evidence. Specific, dated, already discussed. Not a characterisation of a year assembled in the week before.

It arrives without the pay conversation attached, which means it can be about improvement rather than about consequence.

The structure to use is the same four sentences as any feedback: the situation, what was observable, the impact on the work, and what changes. Then a date to look again, and the date is the part people skip.

> CHECK FIRST WHETHER IT IS A PERFORMANCE PROBLEM
>
> Could a capable, willing person have done this correctly with what they had? If they did not know what good looked like, lacked the authority, or were overloaded and could not say so, this is a management problem wearing performance clothing, and the conversation should be a different one.

CHAPTER 7

What this replaces, and what it does not

Being clear about scope, because quarterly check-ins get asked to carry more than they can.

It replaces the annual review as an evidence-gathering exercise. You still have an annual conversation if you want one; it just reads a document instead of reconstructing a year.

It does not replace feedback. Feedback belongs close to the work, within a day or two. A quarterly conversation is far too slow for that and using it that way means most feedback never gets given.

It does not replace the weekly one-to-one. Different purpose, different rhythm. The check-in is about the shape of the role; the one-to-one is about this week.

It does not replace goals. The check-in asks about direction. Goals with numbers and dates are a separate instrument.

What you end up with is four instruments at four cadences: feedback within days, one-to-ones weekly, check-ins quarterly, pay annually. Each doing one thing. That separation is what stops any of them becoming the meeting where everything difficult happens.

CLOSING

Quarterly, short, and written down

The annual review does not fail because the form is wrong. It fails because it asks memory to do something memory cannot do, and then dresses the result up as an assessment.

Four twenty-minute conversations a year, the same four questions each time, both people writing three or four lines while they are talking, into one rolling document per person. That is the entire method.

Keep pay in a separate meeting, or the development answers become strategic. Keep feedback close to the work, or the check-in becomes the place difficult things are stored up. And put all four dates in the calendar for the year now, because the ones that get scheduled quarter by quarter are the ones that slip.

The sheet overleaf covers one quarter for one person. Copy it four times.

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Quarterly check-in sheet

Twenty minutes · both sides write · v1

Question	Their answer	My answer
1. What went well? a thing that happened, not a quality		
2. What was harder than it should have been? about the work, not the person		
3. What do you want to be doing more of in a year?		
4. What do you need from me that you are not getting?		
One thing to focus on next quarter in their words, agreed		

Rules. Written during the conversation, not after. Three or four lines per box, not paragraphs. One rolling document per person, four sections a year, nothing deleted. This sheet never determines pay.

Put all four dates in the calendar for the year now. Nobody should be surprised at an annual review; if they are, something was noticed and not said.