

Quarterly Staff Reviews Meeting Script

Hi (name),

Take a seat here.

Are you ready?

Great.

Well, the purpose of our quarterly staff review meeting is to:

- Give us clarity of where you are currently at in your role.
- To help us identify what areas that you are doing really well in and what areas you need to improve on.
- To help us identify what behaviours you need to work on to get to the next level and the skillset needed to get there.
- I'll go through learning lessons so that you can use these to your advantage moving forward
- We will review your role to ensure that you are clear on your role & our expectations. -

I'll assign any new PD and ensure that you have the training and resources to hit your goals.

And we will wrap up the meeting with general company announcements.

Anything else you want to cover in this meeting before we get started?

Great let's jump into your review form.

Thank you for completing this on time.

I have a copy for you here to follow along with.

PULL UP QUARTERLY REVIEW FORM HERE & WALK THE TEAM MEMBER THROUGH YOUR ASSESSMENT

Now that we've gone through your goals for the next 90 days (name), is there any extra training or support that you need from me?

Cover any company announcements here:

I'd love to know what are you most excited about for the next quarter?

One final question (name), are we aligned moving forward?

Great. Here's what I need you to do next:

Update your 1:1 meeting template with your new quarterly goals.

Review your calendar to ensure that you are set up for success

Close the meeting.