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The year-end *review kit*

7 traps, 1 structure, 8 real situations and what to say in each. For every manager with a review to run this season.

Built by Harco for HR and L&D teams. Made to be forwarded to your managers as it is.

WHAT'S INSIDE

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The form is ready. Is the conversation?

Every year, companies invest in the review form, the rating scale and the calendar. Then a manager sits down in front of someone whose year they are about to sum up, and everything depends on a 60-minute conversation that nobody prepared them for.

This kit is about that conversation. It is short on purpose: a manager can read it in 20 minutes the week before their reviews.

14% of employees strongly agree that the performance reviews they receive inspire them to improve.

Gallup, 2017

For HR and L&D

- Forward it to every manager two weeks before review season.
- Use the 8 situations as the agenda of a one-hour manager workshop.
- Give your own process the last word: where this kit and your policy differ, your policy wins.

For managers

- Read sections 2 to 4 before your first review.
- Pick the 2 situations you are most likely to face this year.
- Say your hardest sentence out loud once before you say it for real.

Seven ways a good year turns into a bad review

01

The surprise

Anything an employee hears for the first time in the annual review is a failure of the year, not of the employee.

Instead: If it is new, say it is new, and own the delay.

02

Recency bias

The last six weeks quietly overwrite the other forty-six.

Instead: Go through the year month by month before you write a word.

03

The rating takes over

Once a score is on the table, nobody hears anything else.

Instead: Talk about the year first and the rating last, within your company's process.

04

The halo

One big win, or one big miss, colours every other objective.

Instead: Judge each objective on its own evidence.

05

The monologue

The manager talks 80% of the time and calls it a dialogue.

Instead: They speak first. Aim to talk less than half the time.

06

Vague feedback

"Be more proactive" has never changed anyone's behaviour.

Instead: One situation, one behaviour, one impact.

07

The promise you can't keep

Pay, promotion, budget: things said under pressure to end an awkward moment.

Instead: Say what you will check, with whom, and when you will come back.

03 · BEFORE

Prepare in 30 minutes

- [ ] **Reread the year**
  Last year's objectives, your one-to-one notes, the projects they worked on.

- [ ] **Find 3 facts per objective**
  What happened, when, with what result. Facts, not impressions.

- [ ] **Read their self-assessment**
  Mark where you agree and where you see it differently.

- [ ] **Choose one message**
  The one thing they must leave the room with. Write it in one sentence.

- [ ] **Anticipate the hardest moment**
  What will they say? What will you answer? Write both down.

- [ ] **Check your limits with HR**
  What you can and cannot commit to on pay, promotion and training.

- [ ] **Protect the time**
  60 minutes, a quiet room or a camera-on call, never back to back.

- [ ] **Send the agenda 2 days before**
  Nobody should feel ambushed by their own review.

The question nobody asks: have you said your hardest sentence out loud, even once, before saying it to them?

A 60-minute structure

0 to 5 min

Open

Say why you are here, how the hour will run, and that it is a two-way conversation.

5 to 20 min

Their view first

"How do you look back on your year?" Listen, take notes, do not correct yet.

20 to 35 min

Your view

Strengths first, with facts. Then one or two growth areas, each with a concrete example.

35 to 50 min

Next year

Objectives, development, and what they need from you to get there.

50 to 60 min

Close

Summarise, agree on what will be written, set the date of the next check-in.

Three methods worth knowing

SBI

Situation, Behaviour, Impact

For feedback that is specific and hard to argue with.

DESC

Describe, Express, Specify, Consequences

For addressing a behaviour that has to change.

GROW

Goal, Reality, Options, Will

For building next year's objectives with them, not for them.

The moments that decide a review

Every review has one moment where it can go either way. These are the eight that come up most. For each: what happens, what to avoid, what to try.

1 "I don't agree with my rating."

WHAT HAPPENS They contest the score, bring examples you had not considered, and the review turns into a negotiation.

AVOID *"That's the rating. It has been calibrated."*

TRY "Tell me which part you see differently, and why. Then I'll show you what I based it on, and we'll look at the gap together." If they bring facts you didn't have, say you will check and give a date.

Method · Listen first, then SBI on the evidence

Rehearse it in Harco

2 The top performer who wants a raise you can't give

WHAT HAPPENS Your best person asks for more money or a promotion. The budget is closed.

AVOID *"Budgets are tight this year, you know how it is." Or worse, a vague promise.*

TRY "You have earned this conversation. Here is what I can do now, here is what I can't, and here is what I will push for, and by when."

Method · Honest about limits, concrete about next steps

Rehearse it in Harco

3 The underperformer who doesn't see it

WHAT HAPPENS They rate their year as good. You don't. The gap has never been said clearly.

AVOID *"Overall it's been a bit of a difficult year."*

TRY "On the Q3 reporting, three deadlines were missed. The team had to redo the consolidation twice. How do you see it?" Then agree on two measurable changes and a 30-day checkpoint.

Method · SBI, then their view, then GROW

Rehearse it in Harco

4 Tears, or anger

WHAT HAPPENS The emotion arrives fast and the plan for the hour disappears.

AVOID *"Calm down." Rushing to fix it. Taking back what you said to make it stop.*

TRY "I can see this matters to you. Take the time you need. Do you want to continue now, or pick this up tomorrow?" Keep the facts, change the pace.

Method · Acknowledge, pause, choose together

Rehearse it in Harco

5 The silent one

WHAT HAPPENS One-word answers. You end up filling every silence and running a monologue.

AVOID *Answering your own questions. Moving on at the first pause.*

TRY "What are you most proud of this year?" "If you were in my seat, what would you ask of yourself?" Then count to five before you speak again.

Method · Open questions, and real silence

Rehearse it in Harco

6 Great results, problem behaviour

WHAT HAPPENS The numbers are excellent. The way they are achieved is hurting the team.

AVOID *"Your numbers are great, so let's not worry about the rest."*

TRY "In the last two team meetings you cut colleagues off. It is changing how people share ideas. I need you to let people finish. It matters for your next step here."

Method · DESC

Rehearse it in Harco

7 The person you have managed for three months

WHAT HAPPENS You inherited the team, or you were their peer last year. You only saw part of their year.

AVOID *Pretending you saw everything. Or the opposite: having no view at all.*

TRY "I joined in June, so I will rely on your view and on what was shared with me. Correct me where I am missing context." Ask more, assert less.

Method · Transparency about what you know

Rehearse it in Harco

8 The remote review

WHAT HAPPENS Camera off, a shared document nobody looks at, and no way to read the room.

AVOID *Reading the form aloud. Reviewing from an open-space desk.*

TRY Camera on, document shared live, and more check-ins than in person: "What are you hearing from me so far?"

Method · Check understanding often

Rehearse it in Harco

06 · AFTER

The 48 hours that count

- [ ] **Write the summary within 48 hours**
  In their words where you can. Send it for their agreement before it goes in the system.

- [ ] **Three objectives, no more**
  Each one with a clear picture of what "done" looks like.

- [ ] **Book the 30-day check-in now**
  Before the calendar fills up. This is where the review becomes real.

- [ ] **One development action, with a date**
  Training, mentoring, a stretch assignment. Something that starts this quarter.

- [ ] **Close every loop you opened**
  Anything you promised to check: check it, and come back when you said you would.

- [ ] **Tell HR what you couldn't answer**
  Your questions are the input for next year's manager support.

Template: the summary email

Subject: Our review, summary and next steps

Hi [first name],

Thanks for today. Here is what I took from our conversation, in a few lines. Tell me if anything doesn't match what you heard.

What went well this year: [2 to 3 points, with facts]

What we agreed to work on: [1 to 2 points]

Your objectives for next year: [max 3, each with what "done" looks like]

What I committed to: [what I will check, and by when]

Our next check-in: [date, 30 days from now]

07 · FROM READING TO REHEARSING

Knowing what to say is not the same as being able to say it.

A kit prepares the head. The review happens out loud, in real time, with a person who reacts. The moment someone says "that's unfair", most managers forget the method they read the day before.

With Harco, your managers rehearse these eight situations before the real one. An AI voice plays the employee: it pushes back, goes quiet, gets emotional. After each session the manager gets clear feedback on what worked, against SBI, DESC, GROW, or your own internal model.

A space where failing is free

Try the hard sentence, get it wrong, try again. Alone before a review, or live in a manager workshop.

Built around your process

Upload your review guide or competency framework and the scenarios adapt to your company.

Your data stays yours

Hosted in Europe. Audio is not stored. Your data is never used to train models.

Create your company's workspace

Try the review scenarios live, then invite your managers before review season starts.

harco.ai/performance-review

Every important conversation deserves to be rehearsed.