

Review Cycle Checklist

When you're ready to launch your Review Cycle, give it one more pass with our recommended checkpoints.



Before You Create The Review Cycle:

- ☐ Is your org chart set up correctly (i.e. Correct managing relationships)?
- ☐ What questions do you want to ask? Will they differ for each section of your Review (Self, Manager, Direct Report, Peer)?
- ☐ Will every review group receive the same template? Do templates differ across departments?
- ☐ Have you set a timeline for your review cycle?
- ☐ Should Managers score their direct reports? If yes, have you created your attributes?



During Review Cycle Configurations:

- ☐ Review Name:
- ☐ Who will be participating in this review cycle?
- ☐ Will your review include a section for peer reviews? If yes, who is responsible for selecting peers?
- ☐ Do you want your managers to answer questions about direct reports, summarize all other's review feedback, or both?
- ☐ When should managers review their direct reports?
- ☐ How should reviewees receive their feedback in their final review packet?
 - ☐ All feedback from peers and direct reports should be shared with the author's name **attached**.
 - ☐ All feedback from peers and direct reports should be shared with the author's name **anonymized**.
 - ☐ All feedback from peers and direct reports should be shared **ONLY** with the reviewee's manager.
 - ☐ All feedback from peers and direct reports should be shared **ONLY** with the reviewee's manager with comments anonymized.
- ☐ Would you like to add a step to calibrate your scored attributes?
- ☐ How should the events in your review cycle occur? Will you (admin) be moving the cycle through each phase manually or should Lattice automatically run through each phase on its own?