

FREE SAMPLE · THE REVIEW MEETING KIT

Five sentences for the review they won't like

And one complete script from the kit.

Read the five sentences →

Go to the script →

Five sentences for the review they won't like

The rating, the evidence, what the next rating up would have taken, your answer when they push back, and what happens next. In the order you say them.

1. The rating first.

Why: One word, before anything else.

“I’m going to start with your rating, then walk you through how I got there. It’s [rating].”

Then stop and let them answer.

2. The evidence.

Why: Two things that happened, each with a date or a number.

“Here’s what I based it on: [first dated example] and [second dated example].”

3. The gap.

Why: What the next rating up would have taken, in their job.

“In your role, [*next rating up*] would have meant [*specific result*]. That’s the gap.”

4. When they push back.

Why: Hear the case, then check the facts by a date.

“You see it differently, and I want to hear why. Walk me through what you think I missed.”

Then:

“I’ll go through this tonight. If I got a fact wrong, I’ll take it back to [*my manager or HR*], and I’ll tell you by [*day*] where it stands.”

5. What happens next.

Why: One goal, one date, and the email the same day.

“I’ll send you a recap today, and we’ll check in on [*the one goal*] on [*date*].”

One complete script from the kit

They rated themselves Exceeds, and you're giving Meets. Here is the kit's script for that meeting as it appears in the kit, with its one-page run sheet. Where it points to a protocol, the protocol is in the full kit.

PART 3 • THE RATING CONVERSATIONS

S3

The self-rated Exceeds you're giving a Meets

[The one-page run sheet ↓](#)

THE SITUATION

Cody Walsh has been an account coordinator at your insurance brokerage for four years. His self-review

runs three pages and rates him Exceeds on all five goals. Part of it is true. When his account lead, Phil, left in July, Cody carried the accounts through September, and Dalton Foods renewed at plus 6%. Two goals fell short: certificates averaged 3.1 days against a two-day standard, and the CRM cleanup went back to the team on September 12, half done. Your rating is Meets, and his raise is 3%.

That mix is what makes it hard. Skip what he got right and he won't believe the rest. Give ground on the gaps and every self-review becomes a negotiation. Self-ratings run high for an ordinary reason: people rate how hard the year was. You're rating what it produced against the written standard.

BEFORE YOU WALK IN

- **Read the self-review twice, then build the gap map** (Before the Meeting: The gap map):
 - Renewals out on time, 90% standard. Both Exceeds: 43 of 44. Agree.
 - Client requests answered within one business day. Cody Exceeds,

you Meets: met all year, nothing beyond it. Small difference.

- Certificates issued within two business days. Cody Exceeds, you Below: averaged 3.1 days, May to November. Gap one.
- CRM cleanup, owned from March, due June 30. Cody Exceeds, you Below: about half the records done, handed back September 12. Gap two.
- Covering open accounts after Phil left. Both Exceeds: 18 accounts, July to September, no lapsed policy, Dalton renewed at plus 6%. Agree.
- Overall: Meets.
- **Check the gaps against the carry.** Both started before Phil left: certificates ran long from May, and the CRM was due June 30.
- **Run the check** (Before the Meeting: The check). He was out two weeks in August, inside the certificate period, so it's a yes. HR reviewed the rating and confirmed no goal counts those weeks.
- **Did you tell him during the year?** Your notes show certificates came up

once, in July, with nothing about the rating.

- **Print the form's definition of Exceeds.** This brokerage's: "Achieves every goal and clearly exceeds the standard on at least two."
- **Expect some version of "I carried this team and you gave me a Meets?"** Learn the answer under If it turns.
- **The numbers and dates in hand:** the raise (3%, effective April 1), HR's extension (Deb Sorensen, 4186) and June 10 for the mid-year. Book 45 minutes; he reads the review afterward.

THE OPENING

"I read your self-review twice. You made a real case, and parts of it are right. You rated yourself Exceeds. My rating is Meets. I'll show you where we agree and where we don't."

Then stop. Don't fill the quiet with a softer version.

Agreement first, and specific. General praise tells him a “but” is coming. Give him his own evidence back, strongest first.

“Where we agree. Phil’s accounts: 18 of them, July through September, not one lapsed policy, and Dalton renewed at plus 6 percent. Renewals: 43 of 44 on time. Both Exceeds, same as yours.”

“Client requests I have at Meets: one business day, all year. Close, and not what decided this.”

Then the difference: two goals, in numbers, against the standard. Two items he can check beat ten he can argue with. Don’t add a third.

“Two goals decided the rating. Certificates: the standard is two business days, and from May to November yours averaged 3.1.”

If you never tied it to his rating, own that now:

“I raised certificates once, in July, and I never told you what that meant for your rating. That’s on me.”

“And the CRM cleanup: yours from March, due June 30. When it went back to the team on September 12, about half the records were done.”

“On our form, Exceeds means every goal met and at least two clearly beaten. You beat two. These two weren’t met. That’s the whole difference.”

Ask for his read, and mean it. He may know something you don’t, like a carrier that sat on requests. Check facts by a date; don’t renegotiate the rating in the room.

“That’s how I see it. What am I missing?”

If he names something you can check:

“If I got a fact wrong, I’ll check it and come back to you by Thursday. The rating is my judgment, and it stands.”

Hold the rating, and put the carry where it belongs. His strongest card, and it’s true. It already counts as one of his five goals, and doesn’t erase either miss.

“The carry is real, and it’s in your review in writing. The rating covers all five goals, and the carry is one of them, marked Exceeds.”

Then the number. If it takes over, use Script S9: The raise is small, or zero.

“Your raise is 3 percent, effective April 1.”

Make Exceeds concrete, with dates to check it. “Keep it up” is how this meeting repeats. Give him markers he can measure, and the dates you’ll check them.

“For Exceeds at the next review: certificates at two business days or better, every month. And anything you own finished by its date, or flagged early if it’s slipping.”

“We’ll go over your numbers every month from February and sit down on June 10. On track or not, you’ll hear it then, not in a meeting like this one.”

IF IT TURNS

THEY SAY

“I carried this team and you gave me a Meets?”

If it comes before the two goals, show him those first.

YOU SAY

“You did carry it. Dalton renewed at plus six because of you, and that’s written in your review. Exceeds asks for two more things, and we just went through both.”

If he blames the carry for the CRM:

“I checked that before I wrote the rating. The CRM was due June 30, and Phil left in July.”

→ Protocol P1: When they argue the rating (in the full kit)

THEY SAY

“Then what was the point of my self-review?”

YOU SAY

“It changed the review. Dalton and the 18 accounts are in it because you laid them out, and it stays on file, so your case is on record.”

→ Protocol P1: When they argue the rating (in the full kit)

THEY SAY

“Lacey got Exceeds and did less.”

YOU SAY

“I don’t talk about anyone else’s rating or pay. I’ll talk about yours as long as you want.”

Don't ask how he knows. He's allowed to know, and to tell her his.

→ **Protocol P2: When they compare (in the full kit)**

THEY SAY

"You never told me I wasn't at Exceeds."

If it's true:

YOU SAY

"You're right. I told you about pieces, never what they added up to. I should have. It doesn't change the numbers, and we'll go over them every month from February."

→ **Protocol P4: When they say you never told them, or turn it on you (in the full kit)**

THEY SAY

“I want to appeal.”

YOU SAY

“You can. HR runs appeals: Deb Sorensen, extension 4186. I won’t hold it against you, and until that process says otherwise, the rating stands as written.”

→ Protocol P10: When they won’t sign, want to write a rebuttal, or ask you to change it (in the full kit)

His eyes fill, or his voice catches.

Tissues within reach, then quiet. The rating stays put.

YOU SAY

“No rush. We can take ten minutes. The last part is what Exceeds looks like for you, and I don’t want you leaving without it.”

→ Protocol P5: When they cry (in the full kit)

A flat “Fine.”

YOU SAY

“You can give me more than ‘fine.’ What’s the part that bothers you most?”

Then wait, longer than feels comfortable.

→ Protocol P6: When they go silent, or agree too fast (in the full kit)

THEY SAY

“Maybe I should start looking.”

YOU SAY

“That’s your call, and I’d like you to stay. What I can do is send the partners a note on Dalton this week.”

No counteroffer, and no change in how you treat him if he looks.

→ Protocol P8: When they say they’ll start looking, or quit (in the full kit)

THEY SAY

“Is this because I took time off in August?”

Answer once, with what HR confirmed:

YOU SAY

“The weeks you were out aren’t counted against any goal. HR checked that before the rating was final.”

If he still thinks so, stop:

“You have every right to raise that with HR. Deb Sorensen, extension 4186. I’m going to stop here and let HR know today.”

Write down his exact words. Nothing about the review changes in this room.

→ **Protocol P9: When they bring up HR, a lawyer, their leave, or discrimination (in the full kit)**

In any review: tears (P5), silence (P6), “That’s not fair.” (P1), “I’m going to HR.” (P9). Each protocol has your next sentence.

NEVER SAY

✗ “Everyone rates themselves too high.”

Why: He wrote three pages about his year, and you answered about everybody else’s. It undoes your opening.

- ✗ “You can’t give yourself Exceeds.”
Why: You asked him to rate himself, and the form had the box. Argue the two goals, never his right to make the case.
- ✗ “If it were up to me, you’d have Exceeds.”
Why: It was up to you, and you wrote Meets. Disowning it makes the rating sound fake and you sound powerless, and he’ll repeat both.
- ✗ “It’s just a number.”
Why: It sets his raise and sits in his file. If it were just a number, you wouldn’t have booked 45 minutes for it.
- ✗ “Let’s not get emotional.”
Why: He’s allowed to be upset about his pay and his record. People repeat this line for years about their worst review.
- ✗ “You’re close, maybe next year.”
Why: It sounds like a promise and measures nothing. Give him the markers and June 10 instead.

AFTERWARD

- Same-day note (After the Meeting: The same-day note): his words on the carry and the gaps, and any fact you’ll check, by when. Then check it by that day, even if nothing changes.
- Send Email E3: The gap recap today: where you agree, the two goals, what

Exceeds takes, the monthly check-ins, June 10.

- Keep his self-review with yours, as your policy says. Put both markers in his development plan.
- If he raised August, send Email H2 to HR today, and if you stopped there, hold the recap until HR answers. An appeal goes to HR today too.

S3 The self-rated Exceeds you're giving a Meets

USE IT WHEN

they rated themselves Exceeds and your rating is Meets.

HAVE IN HAND

- The gap map
- The form's Exceeds definition
- HR's extension; June 10

OPEN WITH

“I read your self-review twice. You made a real case, and parts of it are right. You rated yourself Exceeds. My rating is Meets. I'll show you where we agree and where we don't.”

THEN

- 1 Agreement first: Phil's accounts, 43 of 44.
- 2 Two goals, in numbers, against the standard.
- 3 Ask “What am I missing?” Then hold.
- 4 Exceeds made concrete; June 10.

IF THEY SAY → YOU SAY

“I carried this team and you gave me a Meets?”

→ “You did carry it. Dalton renewed at plus six because of you, and that’s written in your review.” (→ P1)

“Lacey got Exceeds and did less.”

→ “I don’t talk about anyone else’s rating or pay.” (→ P2)

“Is this because I took time off in August?”

→ “The weeks you were out aren’t counted against any goal.” (→ P9)

DON'T SAY

✗ “If it were up to me, you’d have Exceeds.”

✗ “You’re close, maybe next year.”

AFTER

- Same-day note: his words, anything you’ll check.
- Email E3 today; June 10 on both calendars.

The Review Meeting Kit

The words for every year-end review meeting, above all the ones the employee won't like.

- 14 meeting scripts, for every rating and every hard moment, each with what to say when it turns
- 11 protocols for the reactions: tears, silence, "That's not fair," "I'm going to HR"
- 16 one-page run sheets to take into the room
- The prep: the check before a low rating, the gap map, the prep sheet
- 8 follow-up emails and 2 notes to HR
- The calibration words, and 3 mid-year meetings
- A comment bank of 526 lines for the written review
- A request email that asks your company to pay

Phone PDF, print PDF and an editable Word file.

See the kit at ratingtalk.com →

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No result is promised. The words help you say what you mean clearly and fairly. How a meeting goes still depends on you, on the other person and on your workplace.

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