

CELEBRATE. REFLECT. REFRESH.

End-of-Year Recognition Workbook

Turn your checklist review into a practical plan for the year ahead. Capture what worked, where employees need support, and what you will do next.

Your program at a glance

Company / program

Review year / period

Completed by

Review date

How to use this workbook

1. Review recognition data and gather employee feedback.
2. Complete the eight worksheets alongside your checklist.
3. Choose priorities, assign owners, and set a review date.

Worksheet guide

- | | |
|------------------------------|-----------------------------------|
| 1 Program Performance Review | 2 Employee Feedback & Sentiment |
| 3 Program Features & Content | 4 Manager & Leadership Engagement |
| 5 Communications & Awareness | 6 Budget & Rewards |
| 7 Planning for the New Year | 8 Celebration & Acknowledgment |

What is the biggest question you want this review to answer?

WORKSHEET 1 OF 8

Program Performance Review

Look at participation, reach, and trends. Use consistent reporting periods and metric definitions when comparing results.

Capture your core metrics

Metric	This period	Prior period	What changed?
Recognitions sent			
Nominations submitted			
Challenges completed			
Participation / reach			

Which teams, managers, or employees stand out? Where do you see growth or a decline?

What does the data suggest you should continue, investigate, or change?

Next action / owner / due date

Use your program's participation definition consistently. Counts and participation rates answer different questions.

WORKSHEET 2 OF 8

Employee Feedback & Sentiment

Combine employee feedback with program data to understand what people value and what gets in their way.

Record the feedback you have

Feedback source	Key theme	Evidence / example
Survey / pulse		
Focus group / conversation		
Comments / suggestions		

How do employees feel about the recognition options, badges, and rewards? What do they want more of?

What prevents participation, and what change would make recognition easier or more meaningful?

Next action / owner / due date

If feedback is missing, decide who to ask, what to ask, and when to gather it before making changes.

WORKSHEET 3 OF 8

Program Features & Content

Review badges, campaigns, challenges, and rewards for relevance, use, and alignment with company values.

Audit a few priority offerings

Badge / feature / reward	Keep, refresh, or retire?	Reason / proposed change
Offering 1:		
Offering 2:		
Offering 3:		

Which values or recognition moments are well represented? What is missing or outdated?

Which underused offering needs better promotion, training, or a refresh?

Next action / owner / due date

Low use is a starting point for investigation. Confirm whether the issue is relevance, awareness, or ease of use.

WORKSHEET 4 OF 8

Manager & Leadership Engagement

Review how managers and leaders participate, model recognition, and support employees across teams.

Identify where support is needed

Team / leader	Participation / visibility	Support or next step
Team / leader 1:		
Team / leader 2:		
Team / leader 3:		

Where are managers and leaders setting a strong example? What can other teams learn from them?

Who would benefit from guidance, training, or a targeted campaign? What support will you provide?

Next action / owner / due date

Consider both activity and recognition quality. Specific, timely appreciation can be as useful as higher volume.

WORKSHEET 5 OF 8

Communications & Awareness

Review how employees hear about the program and which messages lead to meaningful participation.

Review your communications

Channel / campaign	What worked?	Gap / next step
Newsletter / announcement		
Campaign / contest		
Themed recognition week		

Which messages or campaigns helped employees participate? What evidence supports that conclusion?

Who may be missing your messages, and how will you reach them in the new year?

Next action / owner / due date

Account for employees who work in the field, on shifts, or away from a desk when choosing channels and timing.

WORKSHEET 6 OF 8

Budget & Rewards

Review program usage and spending, then outline a realistic budget for next year.

Build your budget snapshot

Measure	Amount / value	Notes / source
Points awarded		
Points redeemed		
Unredeemed point balance		
Reward spend / budget		

What explains budget savings or overages? What assumptions should change for next year?

How will you encourage redemption and budget for growth, new rewards, or campaigns?

Next action / owner / due date

Keep points and currency distinct. Record your conversion assumptions and any costs included in the budget.

WORKSHEET 7 OF 8

Planning for the New Year

Translate your findings into measurable goals and a manageable plan for program improvements.

Set your goals

Goal / measure	Current baseline	Target / review date
Goal 1:		
Goal 2:		
Goal 3:		

Which campaigns, challenges, badges, or training will support these goals?

What feedback will shape new initiatives, and how often will you review progress?

Next action / owner / due date

Start with a few priorities you can sustain. Include an owner, a baseline, and a review date for each goal.

WORKSHEET 8 OF 8

Celebration & Acknowledgment

Choose how you will celebrate the people and moments that made your program meaningful this year.

Plan your year-end celebration

Person / story / milestone	How to celebrate	Owner / timing
Program champion:		
Success story:		
Award / recognition event:		

Which results and employee stories best demonstrate the impact of your program?

How will you share appreciation across teams and include employees who are harder to reach?

Next action / owner / due date

Celebrate contributions across roles and teams. Confirm permissions before sharing employee stories or photos.

FROM REFLECTION TO ACTION

Your Year-Ahead Action Plan

Bring your worksheet findings together. Choose up to three priorities and give each one a clear owner and timeline.

Choose your top priorities

Priority / action	Owner	Due date	Success measure
Priority 1:			
Priority 2:			
Priority 3:			

What is one quick win you can complete in the next 30 days?

What budget, leadership support, or resources do you need?

Next review date

Review participants

At your next check-in: review progress, capture lessons learned, and adjust the plan based on participation and employee feedback.