Performance management plan checklist

Use this list to make sure you do all necessary steps for a good formal performance management process

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| Step 1: Identify the issues | Yes | No | n/a |
| Have you: | | | |
| * checked the employee’s job description to confirm the agreed performance standards? |  |  |  |
| * checked the clause in their employment agreement about poor performance? |  |  |  |
| * identified where they are failing, meeting and exceeding expectations? |  |  |  |
| * identified any training or support they have had, and thought about anything extra you could provide to improve their performance? |  |  |  |

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| Step 2: Arrange a meeting | Yes | No | n/a |
| Have you requested a meeting with your employee in writing? |  |  |  |
| Does your meeting request state the reason for the meeting is to discuss performance? |  |  |  |
| Does your meeting request state the employee can bring a support person to  the meeting? |  |  |  |
| Have you allowed enough time (2-3 working days) between sending the invitation and holding the meeting? |  |  |  |

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| Step 3: Meet with the employee | Yes | No | n/a |
| Did you begin the meeting by: | | | |
| * discussing the employee’s overall performance and outlining the areas of concern? |  |  |  |
| * allowing them to respond? |  |  |  |
| * considering any contributing factors, e.g. personal issues or whether they think they haven’t had sufficient training? |  |  |  |
| After discussing the issues, did you: |  |  |  |
| * agree what the acceptable standards will be going forward? |  |  |  |
| * talk about what needs to happen for your employee to meet these standards? |  |  |  |
| * discuss what training and support (if any) you’ll provide to help your employee meet  these standards? |  |  |  |
| * agree when you will meet again to review their performance progress? |  |  |  |
| * inform them what the impact will be if they do not meet the performance standards? |  |  |  |

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| After the meeting did you: | | | |
| * document the performance agreement? |  |  |  |
| * put a copy of the performance agreement in the employee’s personnel file? |  |  |  |
| * give a copy of the performance agreement to the employee for their reference? |  |  |  |

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| Step 4: Track their progress | Yes | No | n/a |
| During the period between the first meeting and the review have you: | | | |
| * documented dates when performance is particularly good? |  |  |  |
| * documented dates when performance is not up to standard? |  |  |  |
| * documented any training or support you have provided? |  |  |  |

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| Step 5: Meet to review progress | Yes | No | n/a |
| Have you requested the follow-up meeting in writing? |  |  |  |
| Have you scheduled the follow-up meeting for the date agreed during the first meeting? |  |  |  |
| Does your meeting request state the employee can bring a support person to  the meeting? |  |  |  |
| Have you allowed enough time (2-3 working days) between sending the invitation and holding the meeting? |  |  |  |
| Have you requested the follow-up meeting in writing? |  |  |  |
| During the meeting, did you discuss: | | | |
| * whether the agreed performance standards have been met? |  |  |  |
| * if there are any areas still needing improvement? |  |  |  |
| * the significance of any areas still needing to improve? |  |  |  |
| * what will happen next? |  |  |  |
| Did you document the outcome of this meeting and put a copy in your employee’s personnel file? |  |  |  |
| Did you provide your employee with a written copy of the meeting outcomes? |  |  |  |