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?
 |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| 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?
 |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| 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? |  |  |  |