

# Performance management plan checklist

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

Step 1: Identify the issues	Yes	No	n/a
<b>Have you:</b>			
• 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?			

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

Step 3: Meet with the employee	Yes	No	n/a
<b>Did you begin the meeting by:</b>			
• 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?			
<b>After discussing the issues, did you:</b>			
• 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?			

For more information, see [Business.govt.nz](https://business.govt.nz)'s Hiring and managing people section.

<b>After the meeting did you:</b>			
• 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?			

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

<b>Step 5: Meet to review progress</b>	<b>Yes</b>	<b>No</b>	<b>n/a</b>
<b>Have you requested the follow-up meeting in writing?</b>			
<b>Have you scheduled the follow-up meeting for the date agreed during the first meeting?</b>			
<b>Does your meeting request state the employee can bring a support person to the meeting?</b>			
<b>Have you allowed enough time (2-3 working days) between sending the invitation and holding the meeting?</b>			
<b>Have you requested the follow-up meeting in writing?</b>			
<b>During the meeting, did you discuss:</b>			
• 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?			
<b>Did you document the outcome of this meeting and put a copy in your employee's personnel file?</b>			
<b>Did you provide your employee with a written copy of the meeting outcomes?</b>			

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