



PERFORMANCE PLANNING AND REVIEW

[Audit title]

[Document Subtitle]

Author's name

Employee	
Performance cycle (from date/to date)	
Manager	
Date of performance planning meeting	
Date of mid-cycle review meeting	
Date of end-cycle review meeting	

PERFORMANCE PLANNING

*Discuss, agree, mutually commit to and complete this template with the employee.
Print out and sign to recognise agreement.*

Work executed (outputs, projects and deliverables): What work are you responsible for this year? Discuss, define and record goals.

Behaviour and conduct: How do you intend to interact with others and complete your work this year? Discuss company values and record behaviours in line with these, depending on the position.

Knowledge and skills: What do you need to do your job well this year? Discuss L&D and how to apply it. Record.

Support: What do you need from me to do your job to the best of your ability? Discuss and record any changes to current arrangements.

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Performance measurement: How do you know you're performing well? Discuss and record KPIs generally or specifically depending on the position.

Manager's agreement:	
Signature:	Date:
Employee's agreement:	
Signature:	Date:

MID-CYCLE REVIEW

What have you achieved compared to what we agreed on in the planning meeting?
What did you do well or better than expected?
What could you do better? What didn't go to plan? What happened? Discuss and record areas for improvement and reasons for the gap.
What are we going to do next? How are we going to get back on track? Discuss and record follow-up actions.
How have you performed to date? Discuss and record performance summary.
Work executed:
Behaviour:
Skills/knowledge:
Support:

Performance summary (manager to summarise performance in conversation with employee as well as in writing below.)	
<input type="checkbox"/> Doing a good (or even better) job	
<input type="checkbox"/> Not performing to expected standards	
Signature:	Date:

Employee's comment:	
Signature:	Date:

END-CYCLE REVIEW

What have you achieved this year?
What did you do well or better than expected?
What could you do better? What didn't go to plan? What happened? Discuss and record areas for improvement and reasons for the gap.
What are we going to do next? How are we going to get back on track? Discuss and record follow-up actions.

How have you performed this cycle? Discuss, summarise and record.
Work executed:
Behaviour:
Skills/knowledge:
Support:

Performance summary (manager to summarise performance in conversation with employee as well as in writing below.)	
<input type="checkbox"/> Doing a good (or even better) job	
<input type="checkbox"/> Not performing to expected standards	
Signature:	Date:

Employee's comment:	
Signature:	Date: