Performance Management Templates

These templates are designed to simplify the performance management process, and turn it from a 'tick and flick' into a process where you have real conversations and make a real difference in your employee's work lives.

10 minutes a day per employee is all you need...

But first you need to set some goals for your team and individuals.



DAILY

WEEKLY

MONTHLY

QUARTERLY

Goal Setting

Ask some questions:

What are the organisations goals? What are your goals for your team?
How does the individual person contribute to those goals?
What competencies will be necessary for the individual to contribute to these goals?
What do you want the individual to be able to do? (Knowledge, skills, abilities, attitudes.)
What does the employee want to be able to do?
How do you want the employee to conduct themselves? (Attitudes, behaviours)
What do you want the employee to achieve? (Quantity, Quality)

DAILY
WEEKLY
MONTHLY
QUARTERLY

Goal Setting

Goals need to:
Align with the objectives of the business.
Align with the objectives of your team
Give the individual something to grow towards
Have a way to be measured, and a date they are expected to be achieved.
Have a clear path forwards.

Goal No.	Description	Measured by	Achievement date	First Steps	Notes

Not too many! Have:

- One or two goals aligned to the organisation
- One or two aligned to the team's objectives
- And one or two aligned to the individual's aspirations.

BONUS!

If you can provide a tangible reward that is valuable to the individual for completion of a goal, note that down!

DAILY

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Daily Check Ins

The check in should take no more than 5 minutes. Can be phone, online, face to face.
Check that everyone is happy with their performance and the performance of their work group. Check with individuals as well as the work group as a whole.
Offer assistance if required.
Purpose is to catch small things before they become big things.

Date	Time	Check In With	Assistance Needed	Notes
25/09/2024	9:00am	Fiona	None	Fiona is happy with her progress and has no problems within the team to report.
25/09/2024	9:05am	Steven	Says he is slipping a bit on completion of his part of the customer capture project.	Ask if anyone else has some time to assist Steven with the data entry.
25/09/2024	10:00am	Team	Asked whether anyone could offer an hour for data entry for the customer capture project. Alice advised she could help.	Nominate Alice for an Employee Award for her team spirit.

DAILY

WEEKLY

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Weekly Goal Check

The check in should take around 10 minutes.
Can be by phone, online or face to face.
Review performance against goals. List all goals.
Offer assistance if required.
Purpose is to update progress, celebrate wins, catch issues.

Date	Time	Check in With	Goal No.	Progress	Assistance

DAILY

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Monthly One-on-One

The one-on-one should take 20-30 minutes.
Should be face to face. Find a private, uninterrupted space.
Check in on employee's personal circumstances, physical well being and mental state.
Review progress toward goals. List each goal.
Offer assistance, coaching, mentoring, guidance as necessary.
Purpose is to offer feedback, ensure forward movement.

Employee's Name:

Month	Personal	Physical	Mental	Goal No	Progress	Assistance

DAILY

WEEKLY

MONTHLY

QUARTERLY

Quarterly Goal Review and Calibration

The review should take 30-45 minutes.
Should be face to face. Find a private, uninterrupted space.
Review progress toward goals. List each goal.
Celebrate wins.
Amend or set new goals if goals have been achieved.
Purpose is to keep it fresh and exciting, and in line with organisational goals.

Employee's Name:

Goal No.	Description	Progressed	Achieved	Amended	Amended Goal	Notes

DAILY
WEEKLY
MONTHLY
QUARTERLY