PERFORMANCE & GROWTH PLAN

1 | Set clear expectations

Employee name

Role / position

Manager name

Review period

STEP 1 | Goals & expectations

Agree on what success looks like, not just what needs to be done.

Goal 1 - Expected outcome

How will we measure success?

Goal 2 - Expected outcome

How will we measure success?

Goal 3 - Expected outcome

How will we measure success?

MANAGER TIP

Focus on 1-3 meaningful goals with clear, observable results.

STEP 2 | Training & support

Identify what will help the employee succeed.

Current strengths and skills

Skills or knowledge to develop

Training, tools or resources to provide

STEP 3 | Progress & development

Record achievements and agree on practical growth actions.

Achievements / progress so far

Development priority

Action to take

Target date

STEP 4 | Ongoing feedback & coaching

Use regular check-ins to review progress, address barriers and offer support.

Check-in frequency

Next check-in date

COACHING NOTE 1

Date

Observation / feedback

Agreed next step

COACHING NOTE 2

Date

Observation / feedback

Agreed next step

STEP 5 | Recognition

Capture specific contributions and how they were acknowledged.

Achievement / contribution recognized

Recognition given and date

PERFORMANCE & GROWTH PLAN

4 | Review results and agree on next steps

STEP 6 | Performance review

Discuss results, strengths and opportunities for growth.

Review date

Overall progress (e.g., on track / needs support)

Results and key achievements

Areas to strengthen

STEP 7 | Adapt & move forward

Adjust goals or support based on what you learned together.

What will change? (goals, approach, training or support)

Agreed action / next step

Action owner

Follow-up date