Performance management plan task list

Use this task list to plan your process for formally managing performance.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Step | Action | Suggested Timeframe | Planned completion date | Date completed |
| **1** | Identify the issues. Where is your employee failing, meeting and exceeding expectations? | As soon as you become concerned about an employee’s performance. |  |  |
| **2** | Request a meeting with your employee in writing. | Allow 2-3 working days between the meeting request and the meeting. |  |  |
| **3** | Meet the employee and document the performance agreement for a set timeframe. Agree on a date when you will meet again to review performance progress.  | Provide documentation of the meeting outcomes to your employee within 1 working day of the meeting. |  |  |
| **4** | Track and document their performance progress. | Two months after the first meeting. |  |  |
| **5** | Meet to review progress and document the outcome of the meeting. | On the date agreed in the first meeting. |  |  |