

## Performance Management Cycle Documentation Template

*Employee Name:* \_\_\_\_\_ *Position/Role:* \_\_\_\_\_

*Manager Name:* \_\_\_\_\_ *Review Period:* \_\_\_\_\_

### Step 1: Role Accountability

- **Goals and Expectations:** Describe the employee's specific performance goals and expectations for this review period.
  - Goal 1:
  
  - Goal 2:
  
  - Goal 3:
  
- **Progress Measurement:** Outline how progress towards these goals will be measured and tracked.
  - Measurement Method:

### Step 2: Training and Resources

- **Training Provided:** Document any training, resources, or tools provided to support the employee's role and goal attainment.
  - Training Program:

- **Resources:**
  
- **Knowledge Assessment:** Assess the employee's knowledge and skills related to their role and goals.

- **Knowledge Level:**

### **Step 3: Documentation and Growth Plan**

- **Achievements:** Record the employee's accomplishments, including successes and areas for development.
  
- **Achievements:**
  
- **Areas for Improvement:**
  
- **Growth Goals:** Set clear, actionable growth goals for the employee based on their performance assessment.

- **Growth Goal 1:**
  
- **Growth Goal 2:**
  
- **Growth Goal 3:**

#### **Step 4: Ongoing Feedback and Coaching**

- **Feedback and Coaching Schedule: Outline the schedule for regular feedback and coaching sessions.**
  - **Frequency:**
  
- **Feedback Highlights: Summarize key feedback points and coaching discussions.**
  - **Feedback/Coaching Date:**
  
  - **Observation**
  
  - **Action Plan:**
  
  - **Feedback/Coaching Date:**

- **Observation:**
  
- **Action Plan:**
  
- **Feedback/Coaching Date:**
  
- **Observation:**
  
- **Action Plan:**

#### **Step 5: Reward and Recognition**

- **Recognition Methods: Document the methods used to recognize and reward the employee's achievements.**
  - **Recognition Methods:**
  
- **Recognition Instances: Record instances of recognition and reward provided to the employee.**
  - **Recognition Date:**
  - **Type of Recognition:**

## **Step 6: Periodic Performance Assessment**

- **Performance Review Schedule: Specify the schedule for periodic performance assessments.**
  - **Review Frequency:**
  
- **Performance Assessment: Summarize the employee's overall performance, accomplishments, and areas for development.**
  - **Performance Rating:**
  - **Summary of Achievements:**
  
  - **Areas for Development:**

## **Step 7: Adapt and Evolve**

- **Action Plan: Document any adjustments or changes needed in the employee's goals, training, or performance management approach.**
  - **Action Plan:**