Performance review discussion plan template

You can use this template to help you prepare for a performance review, stay focused, let the employee know how well you think they've performed against their individual performance goals and agree on goals for the next performance cycle. We recommend that you use this plan in conjunction with our Setting up a performance system checklist and Performance agreement template.

A performance system will allow you to set clear goals and expectations for your employees. It also provides a process for ongoing feedback and discussion.

Suggested steps for developing a performance review discussion plan

For more information on managing performance, see our online learning courses at www.fairwork.gov.au/learning. For information about minimum employment rights and entitlements you can also call the Fair Work Infoline on 13 13 94 or visit www.fairwork.gov.au.

Step 1:   Before the discussion

Before the performance discussion, use the plan template to record:

- Your employee's individual performance goals for this performance cycle, and how you think they've performed against their goals.
- What you think your employee has done well.
- What you think your employee could do better.

Step 2:   During the discussion

During the meeting, use the plan template to record:

- How your employee thinks they've performed against each of their goals.
- Any feedback or concerns that your employee has.
- Any discussion about the employee's career goals or future within your business.
- Any goals that you and the employee agree on for the next performance cycle, and the support that you'll provide to help the employee meet their goals (eg. training).

Also note when you and the employee will next meet to review their performance, as well as any next steps for you and/or the employee.

You can use the information that you record in the plan to develop the employee's performance agreement for the next performance cycle.

Performance review discussion plan

Before the discussion

What were your employee's individual performance goals for this performance cycle and how well do you think they've performed against each of their goals?

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What has your employee done well?

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What could your employee do better?

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During the discussion

How does your employee think they've performed against each of their goals?

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Does your employee have any feedback or concerns?

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Did you discuss the employee's career goals and future within your business?

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What individual performance goals have you and your employee agreed on for the next performance cycle?

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What support have you agreed to provide to your employee to help them reach their goals?

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When will you next meet with the employee to review their performance?

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What are the next steps?

For you:

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For your employee:

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