

**Performance Management Template**

**INSTRUCTIONS**

**Read and delete this section before sharing the document.**This performance management template is designed to provide the employee with a structured, consistent view of their performance management plan. Use it to map out their KPIs, align them with company goals, and guide the employee toward higher performance levels. Both the employee and their coach should add to the performance management plan by determining success metrics, noting challenges faced, acknowledging milestones reached, and defining next steps for further progress.

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| **Employee name** |  | **Manager name** |  |
| **Job title** |  | **Job title** |  |
| **Department** |  | **Department** |  |

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| **Key objectives***Define the key objectives to be achieved, and explain how each one aligns with company goals.* |
| **Key objective 1** |  |
| **Key objective 2** |  |
| **Key objective 3** |  |

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| **Performance metrics***List the quantifiable measures used to assess the progress and outcomes of the above objectives.* |
|  | **Metric description** | **Target date** |
| **Performance metrics (Key objective 1)** |  |  |
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| **Performance metrics (Key objective 2)** |  |  |
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| **Performance metrics (Key objective 3)** |  |  |
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| **Role-specific competencies***Evaluate competencies specific to the employee’s role (e.g., technical skills, leadership qualities, etc.).* |
| **Role-specific competency 1** | [Describe the level of this competency] |
| **Role-specific competency 2** |  |
| **Role-specific competency 3** |  |
| **Role-specific competency 4** |  |
| **Role-specific competency 5** |  |

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| **Development plans***Outline skill-building initiatives, training needs and career growth opportunities to drive the plan.* |
| **Type of development** | **Initiative description** | **Timeline** |
| **Skill-building initiatives** | [Skill-building initiative 1] |  |
| [Skill-building initiative 2] |  |
| **Training needs** | [Training need 1] |  |
| [Training need 2] |  |
| **Career growth opportunities** | [Career growth opportunity 1] |  |
| [Career growth opportunity 2] |  |

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| **Resource needs***Specify support or resources required from the organization to complete the development plans.* |
| **Resource 1** | [Describe Resource 1, e.g., coaching by a senior employee] |
| **Resource 2** |  |
| **Resource 3** |  |

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| **Employee self-assessment***Summarize the employee’s reflection of their own performance, achievements, and areas for growth.* |
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| **Collaboration and teamwork assessment***Assess the employee’s team contributions and ability to collaborate with their co-workers.* |
| **Day-to-day teamwork** | [Summary of feedback from manager] |
| **Project contributions** | [Summary of feedback from manager] |
| **Peer evaluation** | [Summary of feedback from team members] |

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| **Challenges and obstacles***Document challenges to the employee’s performance and achievement of objectives.* |
| **Challenge 1** |  |
| **Challenge 2** |  |
| **Challenge 3** |  |

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| **Evaluation timeline and feedback***Set a schedule for regular check-ins to review progress and provide updates.* |
| **First check-in [Date]** | [Enter manager feedback and progress update.] |
| **Second check-in [Date]** | [Enter manager feedback and progress update.] |
| **Third check-in [Date]** | [Enter manager feedback and progress update.] |

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| **Recognition and achievements***Acknowledge accomplishments, milestones, and instances of exceptional performance.* |
| **Milestone 1** |  |
| **Milestone 2** |  |
| **Milestone 3** |  |

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| **Future goals and next steps***Set goals for the next evaluation period and outline a roadmap for achieving them.* |
| **Future goal 1** | [List the steps to take to achieve this goal.] |
| **Future goal 2** | [List the steps to take to achieve this goal.] |
| **Future goal 3** | [List the steps to take to achieve this goal.] |



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