



Employee Performance Check-In

Company Name:

Subordinate Name:

Manager Name:

Work Email Address:

ITG| Employee Performance Check-In - Purpose

To Drive better manager-employee relationships, whether being remote or traditional, ITG is introducing the mid-year employee check-in process. It provides the opportunity to review and adjust goals, reflect on performance and identify development opportunities.

Goals Check-In

Goals refer to departmental and functional objectives, certifications, trainings, projects, and milestones

What goals were completed?

What goals are still in progress?

What is in the way of achieving the pending goals?



Performance Check-In

“Behavior” refers to any skill, competency, attitude and personality trait that the employee displays on the job.

What behaviors should this person continue to demonstrate?

What behaviors should this person start doing to achieve results?

What behaviors should this person stop doing to achieve results?

What are the needed resources/ tools to help this person make progress towards achieving better performance?

Evaluative Performance Check-In

Given what I know of this person's performance, I would always want him or her on my team.

1 being Strongly Disagree, 5 Being Strongly Agree

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

During the Year 2025, this person encountered changes in his/her job requirements.

"Changes in the job requirements" can refer to adaptation of new technologies, remote work, change in management, change in work status and job responsibilities, etc.

☐ Yes

☐ No

If yes, what changes did this person encounter?

Promotion: Moving to a higher position within the company's hierarchy

Added Responsibilities: Assigning additional duties within the same role

Shift in Role: Changing position while remaining in the same department

Transfer to another department: Changing role and department

Change in Management: Altering the reporting line

☐ Promotion

☐ Added responsibilities

☐ Shift in role

☐ Transfer to another department

☐ Change in management

☐ Other: _____

This person was directly able to adjust to changing job requirements.

1 being Strongly Disagree, 5 Being Strongly Agree

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	2	3	4	5

If answered 1 or 2, please further elaborate on the reasons the person was not able to adjust to changing job requirements



This person is at risk of low performance.

☐ Yes

☐ No

If yes, please elaborate on the case.

Given that this person is at risk of low performance, I would like to enroll him/her in the Performance Improvement Plan (PIP)

The PIP serves as a structured tool and a planned approach used by HR and Direct Managers to aid the employee in enhancing his/her job performance for a period of 3 months.

☐ Yes

☐ No

If no, please elaborate

This person would perform better in another department.

☐ Yes

☐ No

If yes, please suggest the department and the reason why this person would perform better in.

This person is ready for promotion today.

☐ Yes

☐ No

If yes, please state the position

If no, please suggest a date to review his or her performance and consider his/her promotion.

I would like to add the following note related to this member:

For example: a special case, promotion/career-related point, areas of enhancement, monetary aspect, behavior, etc.

Leadership Dynamics

During the year 2025, I have had a [] call(s)/meeting(s) with this person, to check and follow-up on his/her work.

- ☐ Weekly
- ☐ Monthly
- ☐ Few (Once every two months)
- ☐ Zero

What do you adopt to help team members reach their full potential?

Giving continuous feedback; Examples: constructive criticism, updates on performance, regular check-ins, etc.

Recognizing achievements; Examples: encouragement, motivation, reward, etc.

SMART Goals: Specific, measurable, achievable, relevant, time bound goals

Encouraging continuous learning: Identifying members' technical and soft skills requirements and taking actions accordingly

- ☐ Giving continuous feedback
- ☐ Recognizing achievements
- ☐ Setting and aligning on SMART Goals
- ☐ Encouraging continuous learning
- ☐ Other

Do you actively seek and consider your team members' input?

- ☐ Yes
- ☐ No

If answered yes, please give an example of an input made by the employee and was taken into consideration.

I recognize and reward the contributions of the employee by:

- ☐ Sending a recognition e-mail
- ☐ Providing continuous positive feedback
- ☐ Offering a wider scope of responsibilities
- ☐ Announcing it publicly
- ☐ Offering incentives
- ☐ Not Applicable

You address employee's mistakes through:

Private Discussion: One-on-one confidential meeting with the manager to address incidents

Immediate Correction: Taking initiative in correcting the mistakes without putting the member on the stand publicly

Immediate confrontation: Addressing the mistakes and publicly putting the member on the stand

Blame Approach: Blaming the member in a nonconstructive and non-efficient manner without solving the mistake

Address the root/cause of the problem: understanding the reasons behind the cause of the problem

Constructive criticism: Providing recommendations for improvement rather than pointing out mistakes

Direct Escalation: Raising concerns immediately to the higher level of management without addressing the employee first

- ☐ Private discussion
- ☐ Immediate correction
- ☐ Immediate confrontation
- ☐ Blame Approach
- ☐ Address the root/cause of the problem
- ☐ Constructive criticism
- ☐ Direct escalation

Work Culture & Team Integration

Work culture is described by the general desired attitudes and behaviors the company adopts, such as open communication, accountability, transparency, equality, flexibility, honesty, ...

This person fits in the company culture

- ☐ Yes
- ☐ No

If yes, please give an example. Otherwise, please explain

When it comes to team integration, this person is

- ☐ Well integrated with the team
- ☐ Indifferent with the team
- ☐ Detached from the team

If this person is Indifferent or Detached from the team, please give an example.

This member contributes to enhance the department dynamics' by:

(state the most 3 descriptive options)

- ☐ Having clear and transparent communication
- ☐ Collaborating and supporting the team
- ☐ Adopting a healthy conflict resolution approach
- ☐ Abiding by his/her defined roles and responsibilities
- ☐ Being trustful
- ☐ Having a positive Influence on the team
- ☐ Not applicable

How frequently does this employee reflect stress at work?

Stress is the body's natural response to challenging situations, characterized by physical, emotional, or mental strain.

- ☐ Less frequent
- ☐ Frequent
- ☐ Extremely frequent

In your opinion, what are the reasons behind this stress?

- ☐ Personal
- ☐ Unrealistic Goals
- ☐ Tight Deadlines



Employee Performance Check-In

- ☐ Workload
- ☐ Relationship with manager
- ☐ Relationship with Team members
- ☐ Others