ITG

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?

_____

_____

_____

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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

☐   ☐   ☐   ☐   ☐

1   2   3   4   5

During the Year 2024, 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 or internal reassignment
☐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

☐   ☐   ☐   ☐   ☐

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.

_____

_____

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.

_____

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Leadership Dynamics

During the year 2024, 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

Hold accountable: blaming the member who made the mistake

Adress 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
☐ Hold accountable
☐ Adress 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
☐ Workload
☐ Relationship with manager
☐ Relationship with Team members
☐ Others

Remote-Work Check-In

This person is productive while working remotely home.

☐ Agree
☐ Neutral
☐ Disagree
☐ Not Applicable

As a manager, I would continue giving this person the flexibility of working remotely more frequently.

☐ Yes
☐ No
☐ Not Applicable

If no, please state the reason why you would revoke the Remote Work benefit for this employee.

_____

_____

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