HR411® Performance Management Checklist

This checklist provides a step-by-step overview of the performance management process. Related resources can be found to the right of each step. For more detailed information, read our Performance Management Guide.

QUESTIONS ABOUT PERFORMANCE MANAGEMENT? Contact the HR HelpDesk to speak with an HR Professional

Performance Management Steps	Related Resources
☐ **Schedule performance appraisal** Schedule performance appraisal and request the employee to think about their performance over the past review period.	**Forms:** • Performance Review Procedural Checklist • Strategy Planning Worksheet **Tip of the Week:** • 10 Tips for an Effective Performance Review Process
☐ **Rate employee performance** Prepare for the appraisal meeting by reviewing performance goals and rating performance.	**Forms:** • Performance Appraisal Worksheet
☐ **Hold the performance appraisal meeting** Conduct the performance appraisal meeting by discussing employee strengths and weaknesses and providing the employee with a performance evaluation, including an overall performance rating.	**Forms:** • During the Appraisal Checklist **Tip of the Week:** • 10 Steps for Improving the Performance Meeting
☐ **Set goals for next review period** With the employee's involvement, set performance goals for the next review period.	**Forms:** • Individual Development Plan Worksheet • Setting Individualized Objectives

☐ **Provide regular performance feedback**
Observe employee performance, provide on-going feedback, and adjust performance goals as necessary.

Forms:
• Performance Feedback Script

Tip of the Week:
• 10 Steps for Getting Poor Performers Back on Track