

Performance Management Essentials – A Manager Checklist

A Practical Checklist for Leaders and Managers

This checklist helps managers prepare for, conduct and follow up on performance conversations clearly, fairly and confidently.

<input checked="" type="checkbox"/>	1. Clarify The Issue
<input type="checkbox"/>	Is this a performance, conduct or capacity issue?
<input type="checkbox"/>	Have expectations been clearly communicated?
<input type="checkbox"/>	Is the issue ongoing or isolated?
<input type="checkbox"/>	Are examples factual and specific?
<input type="checkbox"/>	
<input checked="" type="checkbox"/>	2. Prepare for the Conversation
<input type="checkbox"/>	I'm clear on the outcome I want from the discussion
<input type="checkbox"/>	I can explain the gap between expectation and reality
<input type="checkbox"/>	I've considered what support may be appropriate
<input type="checkbox"/>	I'm prepared to listen as well as explain
<input type="checkbox"/>	
<input checked="" type="checkbox"/>	3. Prepare for the Conversation
<input type="checkbox"/>	The discussion was calm and respectful
<input type="checkbox"/>	I focused on behaviours and outcomes, not assumptions
<input type="checkbox"/>	The employee had an opportunity to respond
<input type="checkbox"/>	Expectations and next steps were clearly agreed
<input type="checkbox"/>	
<input checked="" type="checkbox"/>	4. After the Conversation
<input type="checkbox"/>	Brief notes were made and sent to the team member
<input type="checkbox"/>	Support actions were followed through
<input type="checkbox"/>	Timeframes and review points were clear
<input type="checkbox"/>	Further steps were considered if improvement does not occur
<input type="checkbox"/>	

<input checked="" type="checkbox"/>	5. Sense-Check
<input type="checkbox"/>	Was this handled early and proportionately?
<input type="checkbox"/>	Was the approach fair and consistent?
<input type="checkbox"/>	Does this reduce risk rather than escalate it?

One action I will take in the next 30 days:

Final Reminder

You don't need to manage performance perfectly.
You do need to manage it early, clearly and fairly.