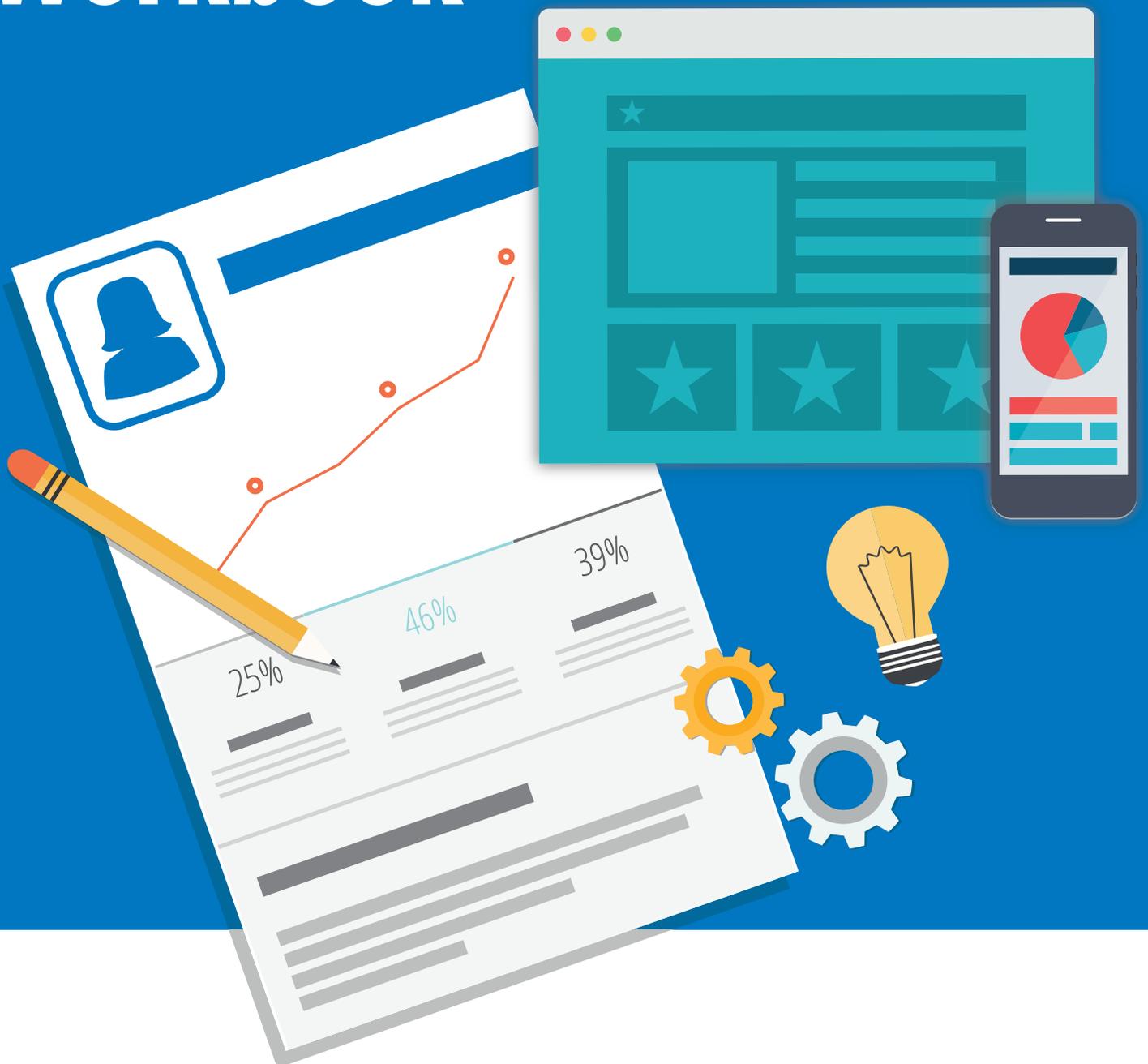


Performance Management 101

Workbook





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Introducing the top things you need to improve your performance management program

Employee performance management has evolved. As an HR professional, you know this better than anyone. Employees are no longer satisfied with a once-a-year perfunctory meeting that assesses their performance at a single point in time, and grades them on the past 12 months.

It's no wonder there's been a death knell for the traditional "annual" performance appraisal for so long.

Employees want continuous feedback and coaching from their leaders and their peers. They want a connection between their work and goals, and those of the organization. They want to understand how they can improve and where they can go next.

There is a better way and it involves a shift from an old cycle and mindset, to a new paradigm that supports HR, managers, and employees on making the process strategic and meaningful.

At Halogen, after working on the topic with more than 2,000 organizations around the globe for more than a decade, we've found that making the move to a new and improved performance management program, you need to revisit some essential elements.

The following table shows the type of shifts required to make a change to your performance management program and process.

Old model	▶	New model
Burdensome, fixed	▶	Flexible, agile, simple
Annual, one-time, one-way feedback	▶	Ongoing, continuous, two-way feedback and coaching
"Set and forget" goals	▶	Goal setting and revising
Subjective ratings	▶	Strong competency models and substantiated feedback from multiple sources
Appraisal-focused	▶	Development-focused



But we know it's easier said than done

So to help you, your managers and employees improve the performance management process, we've compiled a workbook of the best resources and templates we've found to support each of the key areas listed in the table. These best-practice templates are based on proven research and our vast work with other HR leaders like you.

Here's what's inside:



Process - A process flow template for an ongoing performance management cycle (including an annual review process)



Competencies - A competency definition template to improve the way performance is assessed



Feedback - Three feedback templates and discussion guides to help your managers improve their feedback and coaching skills



360 reviews - A 360 degree feedback process and template to help support ratings with multi-sourced feedback



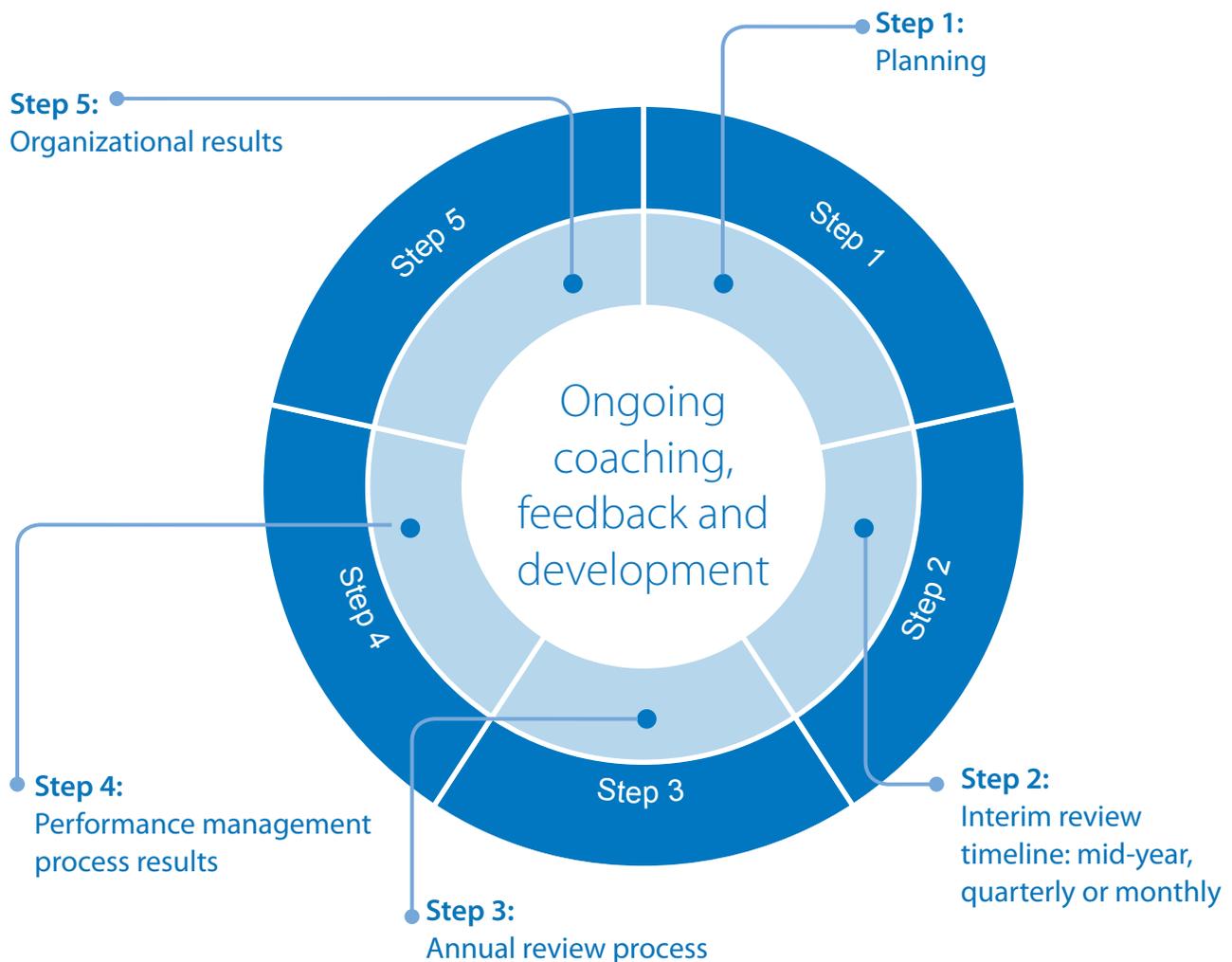
Goals - A goal setting template to help your managers and employees set and track SMART goals



Development - A development plan template so that employees know how they can improve and where they can go next

When used together, these workbook templates can form a strong foundation to improve your process and transform it from a once-a-year pain, to a meaningful ongoing cycle that improves employee performance, alignment and engagement, and yields better results for your organization.

Performance management process flow template and questionnaire



1. Planning

Performance expectations

Core competencies and weightings

Organizational objectives that employees will align individual goals to

2. Interim review timeline

Frequency	Process duration	Steps
e.g.: Monthly check-ins	Up to five days across the organization to set, complete and document monthly meetings	Manager and employee meet, discuss and document: <ul style="list-style-type: none"> • What's working well • What needs support • Goal tracking/ achievement • Areas for development/ development progress • Peer feedback
Quarterly goal setting		
Mid-year review		
Other		

Performance management process flow template and questionnaire... continued

3. Annual review process

Planned duration

Approval steps

Rating scale definitions

Weighting of competencies and goals

Communications plan

Performance management process flow template and questionnaire... continued

Process training (managers, employees)

4. Performance management process results

Is overall process duration increasing, decreasing or stable? (Year over year)

Is overall process duration acceptable? Yes No

If no, ask:

- Is there sufficient time for the overall process and all of its steps to be completed?
- Does process timing coincide with another significant and time-consuming business process (e.g. strategic planning)?
- Are participants engaged with the process? If any participants don't feel they're receiving value from the process, they may disengage and not complete their assigned tasks, impacting on-time completion rates.
- Do participants have what they need to complete the process steps? If participants don't feel competent and equipped to complete their process tasks, they may delay or avoid the tasks, impacting the on time completion rate.



Performance management process flow template and questionnaire... continued

5. Organizational results

Top rated competencies

- Organization: _____
- Business unit: _____
- Department: _____

Top rated competencies

- Organization: _____
- Business unit: _____
- Department: _____

Goal achievement metrics

- Organization: _____
- Business unit: _____
- Department: _____

Top performer distribution

- Organization: _____
- Business unit: _____
- Department: _____

Year over year median appraisal scores

- Organization: _____
- Business unit: _____
- Department: _____

Feedback Template

Before you share feedback

For feedback to be effective, it must be given in the right spirit, and with a goal of helping the employee to develop and be more effective. Before you give an employee feedback, ensure you've met the following pre-conditions for success.

- I have a relationship of trust and mutual respect with this employee.
- My goal in giving this feedback to help the employee develop and improve.
- This feedback will help the employee.
- I am aware of my biases, personal preferences and judgments before giving this feedback.
- I have first offered to give feedback.
- My offer has been accepted.
- The timing is appropriate.
- The location is private.
- I am in the right frame of mind, and ready to dialog (two-way).
- The employee is in the right frame of mind and ready to dialog (two-way).

The feedback dialog

Giving the feedback:	
Identify the specific behavior you want to talk about:	
Give examples:	
Describe your experience and interpretation of the behavior, being sensitive to the impact of your message: For example: "When you did x, I thought you were..."	

<p>Check your assumptions:</p> <p>For example:</p> <ul style="list-style-type: none"> • Am I missing some information? • Am I misunderstanding what transpired? 	
<p>Encourage reflection with a few questions:</p> <p>For example:</p> <ul style="list-style-type: none"> • Did it go as planned? • How did you feel about the interaction? • What did you learn from this event? • How do you think x felt? 	
<p>Ask the employee for their suggestions on what they did well and should continue to do, and what they could do differently to be more effective:</p> <p>For example: If you were going to do it again, what would you do the same and what would you do differently?</p>	
<p>Provide your suggestions on what the employee did well and should continue to do, and how the employee could act differently to be more effective:</p>	

<p>Giving the feedback:</p>	
<p>What if any development activities could help the employee become more effective?</p>	
<p>What coaching/mentoring/role playing support can you commit to providing?</p>	

After you've shared feedback

Summarize what you've discussed, learned and agreed to as an action plan.



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Coaching conversation guide

Coaches instruct, train, develop, assist, and support performance. They use the feedback process to direct and redirect work efforts and behaviors. When coaching your employees, you help them gain self-awareness and insight into their demonstrated behavior. Coaching tells the employee what is good/bad, why it is good/bad, and how they can improve.

Here are some tips for effective coaching conversations.

Coaching tips for reinforcing successful behavior:

- Focus on one successful behavior
- Recount the successful behavior, its outcomes and impacts in detail to the employee.
- Use a specific example.
- Point out the elements that contributed to the result being such a success.
- Work with the employee to identify the root causes for this successful behavior.
- Brainstorm with the employee about ways that the behavior can be replicated in the other circumstances.
- Describe the benefits of this behavior and your confidence in the employee's ability to continue to demonstrate it.
- Document notes of this discussion.
- Watch for and praise repeated demonstration of the successful behavior.

Coaching tips for addressing poor performance:

- Focus on one specific behavior that you consider to be poor performance.
- Rather than describing in detail the behavior that is causing lower than desired performance, describe one thing the employee could do differently to achieve greater success.
- Describe the benefits of this new desired behavior and your confidence in the employee's ability to demonstrate it.
- Use specific examples.
- Listen carefully and be open to the employee's perspective without judgment.
- Involve the employee in identifying how they can master and apply the new desired behavior.
- If required, draft a mutually agreeable development plan.
- Document key elements of this discussion.
- Set dates for a follow up discussion.
- Watch for and praise demonstration of the new desired behavior.



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Conversation starters for manager-employee 1:1 meetings

As a manager, you play an integral role in ensuring lines of communication between yourself and your employees remain open and healthy. One way to do this is by ensuring you and your employees participate in regular, meaningful one-on-one meetings. But sometimes, it can be difficult to know how to start the conversation – and keep it going.

Here are some questions to keep conversations relevant, focused and valuable.

ENGAGEMENT:

Description	Questions
<p>Asking employees job-related questions can increase engagement while at the same time conveying just how important employees are to the organization.</p> <p>Use these questions to zero in on what's important to your employee, including what motivates/demotivates, what they like/dislike about their job and what they need to be successful.</p>	<input type="checkbox"/> What things de-motivate you at work?
	<input type="checkbox"/> What talents or skills do you have that you aren't using often enough in your work today?
	<input type="checkbox"/> If you could change one thing about your work, your role, or your responsibilities, what would it be?
	<input type="checkbox"/> What type of support or assistance would help you to do your job better?
	<input type="checkbox"/> What are the pressures/issues that affect your daily work?
	<input type="checkbox"/> What aspect of your work do you think is most worthy of recognition or praise?
	<input type="checkbox"/> What do you find most rewarding about your current work/role?
	<input type="checkbox"/> What do you enjoy least/most about your job/work?
	<input type="checkbox"/> What would make your job easier? More fulfilling?
	<input type="checkbox"/> What do you need from me that you are not getting?
<input type="checkbox"/> If your role changed completely, what would you miss the most?	

GOALS:

Description	Questions
<p>Effective goal alignment and management requires a regular continuous dialog between managers and employees to see what's on track, what's not – and determine what support is needed.</p> <p>If you'd like to have a goal-focused meeting with your employee, here are some questions that can help drive the discussion.</p>	<input type="checkbox"/> How do you feel your goals progressing?
	<input type="checkbox"/> Are any of your goals causing concern to you?
	<input type="checkbox"/> What could I start or stop doing to help you achieve your goals?
	<input type="checkbox"/> What barriers are preventing you from achieving your goals?
	<input type="checkbox"/> What skill gaps do you see, that, if left unattended, may prevent you from reaching your goals?

CAREER DEVELOPMENT:

Description	Questions
<p>Employees need to know they have the opportunity to progress in their careers and expand or enhance their knowledge, skills and experience.</p> <p>Gain a deeper understanding of your employees' aspirations and career goals by asking these questions.</p>	<input type="checkbox"/> In thinking about your long-term career, what's most important to you?
	<input type="checkbox"/> What are your career aspirations – short and long term?
	<input type="checkbox"/> What do you need me to do to help you on your career path?
	<input type="checkbox"/> What training, skills and development do you see as helping you in your career progression?

LEARNING & DEVELOPMENT:

Description	Questions
Today, employees expect the organization to commit to developing and enriching their skills and experiences. The result? Loyalty.	<input type="checkbox"/> What would you like to learn more about?
Start off your discussion about learning and development by asking employees what they want and need.	<input type="checkbox"/> What might be one area for development that would allow you to perform more effectively?
	<input type="checkbox"/> What types of training or development opportunities would interest you in the weeks and months to come?

PROJECT-SPECIFIC:

Description	Questions
Special focus on a recent project can help you learn more about your employee and also help your employees learn more about themselves.	<input type="checkbox"/> What was most challenging about a recent project/experience?
Use these experience-/project-related to demonstrate your interest in your employees and to gain deeper insight into them.	<input type="checkbox"/> Do you think the project was a success?
	<input type="checkbox"/> Looking at a recent project/experience, where do you see opportunities to improve the process (or quality, timing, etc.)
	<input type="checkbox"/> What most surprised you while working on a recent project?
	<input type="checkbox"/> What would you do differently next time?



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Goal setting template

To set effective employee goals you should:

- Create goals in consultation with your employee. As you discuss and refine the goals, you're exchanging "bigger picture" information about both of your expectations, and coming to consensus.
- Tailor the level of detail you capture to your employee's needs. A more senior or autonomous employee will need less detail than a less experienced or less independent employee.
- Write goals that are specific, measurable, achievable, relevant and time-bound (SMART).
- Make sure that goals are achievable both individually and as a group. Assigning too many goals, even though each one might be achievable on its own, sets the employee up for failure.
- Start with the end result in mind and clearly identify how success will be measured.
- Always link individual employee goals to the higher level organizational goals they are designed to support, so the employee has a clear context for their work.

Goal title	
Description	
Due date	
Deliverables	
Interim milestones	
How will success be measured	
Dependencies	
Resources needed or supplied	
Development plans needed to support performance	
Organizational goal this goal supports	



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Competency definition template

Competencies are a tremendously useful tool for communicating expectations about “how” work gets done.

They also help you define, communicate and develop your organizational culture and competitive differentiators.

To do that effectively, you need to include core and job specific competencies in things like performance appraisals, job descriptions, job requisitions and talent pool definitions. You should also identify the competencies each of the learning activities in your catalog are designed to develop.

In this way you communicate performance expectations to your employees and help cultivate or develop these critical competencies in your staff.

While you can use off-the-shelf competency libraries, typically it's best to create your own list of competencies, complete with detailed definitions; this helps your organization communicate more exactly and specifically the behaviors and skills it values and that help it achieve success.

To help you capture these competencies and detailed descriptions, we've created a template that helps you:

- Identify and describe the competencies that are important to your organization's success and to success in various roles.
- Describe what the various levels of demonstration look like to your employees.
- Provide sample feedback text managers can use in performance appraisals or discussions.
- Group these competencies into meaningful categories for easier reference.

We've also provided you with sample content for a competency taken from our competency library to help guide your efforts.

You can take this template one step further by identifying coaching and development resources and activities managers and employees can use to increase proficiency.

Sample:

Category: people management

Competency	Definition	Descriptions of levels of demonstration	Comments		
			Slightly more positive	Neutral	Slightly more negative
Delegating Responsibility	<p>Makes it a practice to delegate responsibility whenever it is appropriate to do so. Sees to it that employees have the ability, potential and motivation level to perform delegated work effectively and gives them enough authority to carry out these assignments.</p> <p>This contrasts with those who hold onto tasks that could be done by others, assign tasks without clear direction or sufficient authority, select inappropriate individuals to take on delegated assignments, or tend to overload certain individuals with tasks in a manner that creates an unbalanced workload on the team.</p>	5	<p>He/She has an excellent ability to delegate responsibility to the appropriate people. As a result, his/her staff members gain experience by dealing with new challenges, and the workload is always balanced.</p>	<p>He/She always delegates responsibility to the appropriate people. As a result, the workload is well balanced.</p>	<p>He/She always maintains a balanced workload by delegating responsibility where appropriate.</p>
		4	<p>He/She has a very good ability to delegate responsibility to the appropriate people. As a result, his/her staff members gain experience by dealing with new challenges, and the workload is usually well balanced.</p>	<p>He/She delegates responsibility to the appropriate people. As a result, the workload is well balanced.</p>	<p>He/She maintains a balanced workload by delegating responsibility where appropriate.</p>

				<p>He/She usually delegates responsibility to the appropriate people. As a result, the workload is fairly well balanced.</p>	<p>He/She often maintains a balanced workload by delegating responsibility where appropriate.</p>
			<p>He/She is able to delegate responsibility to the appropriate people. As a result, his/her staff members gain experience by dealing with new challenges.</p>	<p>He/She tends to hesitate to delegate responsibility to others. As a result, (he/she) takes on too many tasks himself/herself.</p>	<p>He/She hesitates to delegate responsibility. As a result, the workload is not always well balanced.</p>
			<p>Able to delegate responsibility when necessary. Usually considers the employee's ability, potential, and ambition.</p>	<p>He/She has difficulty delegating responsibility. He/She must learn to recognize when it is beneficial to delegate smaller tasks, in order to free himself/herself to handle larger issues.</p>	<p>He/She does not delegate responsibility at appropriate times.</p>
3			<p>Tends to become overburdened. Needs to delegate responsibility more often.</p>	<p>He/She does not use good judgment as to when it is appropriate to delegate</p>	<p>He/She does not use good judgment as to when it is appropriate to delegate responsibility. He/She does not delegate responsibility to able employees, and as a result his/her time is not free to handle larger issues.</p>
			<p>Does not use good judgment as to when it is appropriate to delegate responsibility.</p>	<p>He/She often waits too long to delegate responsibility. He/She must delegate smaller tasks, in order to free himself/herself to handle larger issues.</p>	<p>He/She does not use good judgment as to when it is appropriate to delegate responsibility. He/She does not delegate responsibility to able employees, and as a result his/her time is not free to handle larger issues.</p>
			<p>1</p>	<p>Does not use good judgment as to when it is appropriate to delegate responsibility.</p>	<p>He/She does not use good judgment as to when it is appropriate to delegate responsibility. He/She does not delegate responsibility to able employees, and as a result his/her time is not free to handle larger issues.</p>



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Category: _____

Competency	Definition	Descriptions of levels of demonstration	Comments		
			Slightly more positive	Neutral	Slightly more negative
		5			
		4			
		3			
		2			
		1			
		5			
		4			
		3			
		2			
		1			
		5			
		4			
		3			
		2			
		1			



360 degree feedback process template

Planning to introduce a 360 degree multirater evaluation process in your organization?

To get the desired results from your process, you need to design it properly from the start. If you'd like some guidance on designing a best practice 360 degree feedback process, visit our 360 degree feedback center of excellence. You'll find helpful articles, white papers, webinars and case studies.

Here are some fundamental questions you need to ask and answer as you design your process.

Why do you want to gather 360 degree multirater feedback?

- To gain insight into the performance and potential of current and future leaders.
- To gain broader insight into the development needs of employees.
- To gather broader feedback for performance appraisals, helping ensure their fairness, especially where the manager does not have direct or complete knowledge of their employees' performance.

How would you describe your organizational culture?

- More collaborative, collegial and supportive
- More competitive and individualistic.

A company with a more collaborative, collegial and supportive culture may well benefit from gathering multirater feedback for performance appraisals, while one that is highly competitive and individualistic might risk doing harm and further polarizing their workforce. These companies should consider starting with a development focus.



Who should be involved in your 360 degree multirater feedback process?

Who should you gather feedback on?

- All employees
- Employees in the following departments/divisions: [Click here to enter text.](#)
- First level managers
- First level managers in the following departments/divisions: [Click here to enter text.](#)
- Second level managers
- C-level executives
- Potential candidates for c-level executive roles
- Entire management team

Who should you gather feedback from?

- Managers
- Peers
- Managers' managers
- Direct reports
- Indirect reports
- Suppliers
- Customers (internal)
- Customers (external)
- Others: _____

How many people do you want to gather feedback from?

What is an optimal and/or practical number of assessors?

Do you want to establish a minimum number of required assessors?

- No Yes

Minimum: _____

Do you want to establish a maximum number of required assessors?

- No Yes

Maximum: _____



Who will select the assessors?

- Manager
- Employee
- HR

What aspects of performance will be assessed?

- Core competencies
 - Quantitative
 - Qualitative
 - Both
- Leadership competencies
 - Quantitative
 - Qualitative
 - Both
- Performance of goals
 - Quantitative
 - Qualitative
 - Both

When will you conduct 360 degree multirater assessments?

- Any time, as needed
- As part of our regular performance appraisal process
- As part of our regular leadership assessment process

Who can run/launch the process?

- Manager
- Employee
- HR

How will you deal with the results?

Will the feedback be kept anonymous?

- No
- Yes



Who will receive the 360 degree multirater feedback?

- Manager
- Employee
- HR

Will the feedback from individual assessors be viewable?

- No
- Yes

Who can view the individual results?

- | | | |
|-----------------------------------|--------------------------------------|---------------------------------------|
| <input type="checkbox"/> Manager | <input type="checkbox"/> Qualitative | <input type="checkbox"/> Quantitative |
| <input type="checkbox"/> Employee | <input type="checkbox"/> Qualitative | <input type="checkbox"/> Quantitative |
| <input type="checkbox"/> HR | <input type="checkbox"/> Qualitative | <input type="checkbox"/> Quantitative |

Will the feedback be aggregated?

- No
- Yes

Who can view aggregated result?

- | | | | |
|-----------------------------------|--------------------------------------|---------------------------------------|---------------------------------------|
| <input type="checkbox"/> Manager | <input type="checkbox"/> Qualitative | <input type="checkbox"/> Quantitative | <input type="checkbox"/> Summary only |
| <input type="checkbox"/> Employee | <input type="checkbox"/> Qualitative | <input type="checkbox"/> Quantitative | <input type="checkbox"/> Summary only |
| <input type="checkbox"/> HR | <input type="checkbox"/> Qualitative | <input type="checkbox"/> Quantitative | <input type="checkbox"/> Summary only |

Who will deliver the feedback to the employee (if they do not receive the feedback directly)?

- Manager
- HR
- Other _____

Do you need the ability to sort the results and analyze trends?

- No
- Yes

What follow-up or actions plans will be put in place to deal with the results?



How will you administer the process?

- Paper
- Automated system

Communications Plans

For your 360 degree multirater feedback process to be successful, you need to communicate its purpose to all participants, the benefits each stakeholder group and the organization expect to receive, the various roles of each participant and the timing for each activity.

Identify and define all the communications activities you'll execute, ensuring you address all your stakeholder groups and their information needs, as well as the key milestones and measures of success.

Communications Activity	
Audience/stakeholder group:	
Communication vehicle:	
Author/sender: (who does the message come from)	
Key messages:	
Timing:	
Measures of success:	



Training Plans

Your process participants will need training both on your process and forms, and on the skills they need to give effective feedback and evaluate performance.

Create training plans for all stakeholder groups to address their learning needs, making sure to provide a variety of training/learning activities that address different learning styles, take advantage of various training media, and pace learning so learners can gradually acquire the knowledge/skills/expertise they need.

Training Activity	
Audience/stakeholder group:	
Learning goals:	
Training vehicle:	
Key messages:	
Timing:	
Measures of success:	



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360 Degree Feedback Template

Please provide feedback about an employee with whom you have interacted.

Name: _____

Job title: _____

Manager: _____

Department: _____

Ratings definition

EXCEPTIONAL (5): Consistently exceeds all relevant performance standards. Provides leadership, fosters teamwork, is highly productive, innovative, responsive and generates top quality work.

EXCEEDS EXPECTATIONS (4): Consistently meets and often exceeds all relevant performance standards. Shows initiative and versatility, works collaboratively, has strong technical & interpersonal skills or has achieved significant improvement in these areas.

MEETS EXPECTATIONS (3): Meets all relevant performance standards. Seldom exceeds or falls short of desired results or objectives.

BELOW EXPECTATIONS (2): Sometimes meets the performance standards. Seldom exceeds and often falls short of desired results. Performance has declined significantly, or employee has not sustained adequate improvement, as required since the last performance review or performance

NEEDS IMPROVEMENT (1): Consistently falls short of performance standards.

Customer focus

5 - Exceptional; 4 - Exceeds Expectations; 3 - Meets Expectations; 2 - Below Expectations; 1 - Needs Improvement.

	5	4	3	2	1	Not Applicable
Personally demonstrates that external (or internal) customers are a high priority. Identifies customer needs and expectations and responds to them in a timely and effective manner. Anticipates and prevents delays or other things that can adversely affect the customer. Keeps customers informed about the status of pending actions and inquires about customer satisfaction with products or services. This is in sharp contrast to behavior patterns that tend to disappoint customers, leave them feeling forgotten and unimportant or that otherwise result in unmet needs or expectations.	<input type="checkbox"/>					
Comments: _____						



Teamwork

5 - Exceptional; 4 - Exceeds Expectations; 3 - Meets Expectations; 2 - Below Expectations; 1 - Needs Improvement.

Is an effective team player who adds complementary skills and contributes valuable ideas, opinions and feedback. Communicates in an open and candid manner and can be counted upon to fulfill any commitments made to others on the team. This is distinctly different from those who withhold ideas and opinions, offer ideas or opinions that rarely add value to team discussions, have established a track record with many unmet commitments, and/or have not contributed skills that complement the skills of others on the team.	5	4	3	2	1	Not Applicable
	<input type="checkbox"/>					
Comments:	_____					

Initiative

5 - Exceptional; 4 - Exceeds Expectations; 3 - Meets Expectations; 2 - Below Expectations; 1 - Needs Improvement.

Recognizes opportunities and initiates actions to capitalize on them. Looks for new and productive ways to make an impact. Demonstrates this characteristic when it comes to generating new ideas or processes, capitalizing on new business opportunities, seeking-out and taking-on increasing responsibility or resolving problems as they occur. Uses sound judgment about when to take action and when to seek guidance or permission. This is in contrast to those who fail to notice opportunities, wait to be asked or instructed before taking action, seldom offer new ideas or express reservations about taking on additional responsibilities.	5	4	3	2	1	Not Applicable
	<input type="checkbox"/>					
Comments:	_____					

Innovative thinking

5 - Exceptional; 4 - Exceeds Expectations; 3 - Meets Expectations; 2 - Below Expectations; 1 - Needs Improvement.

Is on-the-lookout for new and innovative approaches that will improve efficiency. Embraces and champions new ideas and encourages others to do likewise. Recognizes and rewards people and teams who are creative and innovative. This is in sharp contrast to those who tend to embrace the status quo, struggle with new approaches and discourage others when they are creative and innovative in the pursuit of increased efficiency or effectiveness.	5	4	3	2	1	Not Applicable
	<input type="checkbox"/>					
Comments:	_____					



Seeking feedback

5 - Exceptional; 4 - Exceeds Expectations; 3 - Meets Expectations; 2 - Below Expectations; 1 - Needs Improvement.

Tends to seek out feedback for the purpose of improving work performance and listens to such feedback with an open mind. Leaves those who provide feedback satisfied that they have been heard and that their suggestions will be put to use. This is in clear contrast to those who fail to initiate requests for constructive feedback, come across as closed and defensive when presented with suggestions for improved effectiveness and leave the person providing feedback doubtful that it has been taken to heart or will lead to positive changes in the behavior of the receiver.	5	4	3	2	1	Not Applicable
	<input type="checkbox"/>					
Comments:	<hr/>					

Additional feedback

In what areas is this employee a role model for others in the organization?

In what areas do you recommend this employee focus for development?



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Development Plan Template

Employee: _____

Manager: _____

Date: _____

Tips for taking action:

- Make sure all your development plans are SMART (specific, measurable, achievable, relevant and time bound).
- Consider things you need to stop doing, start doing and keep doing.
- Choose wisely and focus on two to three development needs/goals that are critically important to performance or your career progression.
- When identifying and selecting learning activities, consider your preferred learning style, and choose a variety of formal and on-the-job development activities that will help you acquire and practice the knowledge, skills and experience you need to develop.
- Remember that seventy percent of development happens on the job (work experiences, stretch assignments, special projects, task forces, temporary assignment to other positions, job shadowing, etc.); twenty percent is relationship-based (feedback from manager, peers and direct reports; coaching; mentoring; networking; volunteer work); and, ten percent occurs through formal training or readings (business courses, professional designations, external seminars and conferences, etc.).
- Get regular feedback from your manager, mentor, peers, direct reports, etc. on your progress and performance in the areas targeted for development.
- Celebrate incremental progress.

Development plan name		
Learning goal		
Development is to support	<input type="checkbox"/> Demonstration of a competency: _____ Current performance rating: _____ Target performance rating: _____	
	<input type="checkbox"/> Achievement of a goal:	
	<input type="checkbox"/> Career goal:	
Preferred learning style	<input type="checkbox"/> Reading <input type="checkbox"/> Watching (demonstration) <input type="checkbox"/> Hearing <input type="checkbox"/> Practicum (doing)	<input type="checkbox"/> Leader-led <input type="checkbox"/> Virtual <input type="checkbox"/> Independent <input type="checkbox"/> One on one

Formal development activities (e.g., courses, reading assignments, webinars, conferences, etc.)	
Name:	
Description:	
Due date:	

On the job learning activities (e.g., mentoring relationship, work assignment, job shadowing, coaching, volunteer work, etc.)	
Name:	
Description:	
Due date:	

Check in with manager on performance progress	
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Development plan name		
Learning goal		
Development is to support	<input type="checkbox"/> Demonstration of a competency: _____ Current performance rating: _____ Target performance rating: _____	
	<input type="checkbox"/> Achievement of a goal:	
	<input type="checkbox"/> Career goal:	
Preferred learning style	<input type="checkbox"/> Reading <input type="checkbox"/> Watching (demonstration) <input type="checkbox"/> Hearing <input type="checkbox"/> Practicum (doing)	<input type="checkbox"/> Leader-led <input type="checkbox"/> Virtual <input type="checkbox"/> Independent <input type="checkbox"/> One on one

Formal development activities (e.g., courses, reading assignments, webinars, conferences, etc.)	
Name:	
Description:	
Due date:	

On the job learning activities (e.g., mentoring relationship, work assignment, job shadowing, coaching, volunteer work, etc.)	
Name:	
Description:	
Due date:	

Check in with manager on performance progress



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