PEOPLE | FEEDBACK | GROWTH | RESULTS

DAY ONE

LEADERSHIP TOOLS



PERFORMANCE RECORD & EVALUATION

BASED OFF OF **PERFORMANCE BEGINS ON DAY ONE**

BY KRISTA HAYES, SPHR

Performance Record & Evaluation

EMPLOYEE NAME

ROLE / TITLE

DEPARTMENT

MANAGER NAME / REVIEWER

DATE OF CONVERSATION

REVIEW PERIOD (if applicable)

1 FOCUS AREA

Primary focus of this conversation (select all that apply)

- [ ] Onboarding / 30-60-90 Check-In
- [ ] Conversation Touchpoint
- [ ] Professional Development / Mentoring / Coaching
- [ ] Performance Evaluation (complete sections 4 & 5)
- [ ] Skip-Step
- [ ] Other

NOTES

2 WHAT'S WORKING

Key Wins & Strengths

EMPLOYEE REFLECTION

MANAGER OBSERVATION

ADDITIONAL NOTES

3 OPPORTUNITY AREAS

Specific Opportunity or Area of Concern

EMPLOYEE REFLECTION

MANAGER OBSERVATION

SUPPORTING EXAMPLE(S) / IMPACT

Is this a formal performance concern? (select one)

- [ ] **Yes** — see the Performance Counseling Action Plan template.
- [ ] **No** — developmental feedback and / or coaching only.

ADDITIONAL NOTES — RESOURCES NEEDED

4 PERFORMANCE ASSESSMENT

Mark one rating per competency and add supporting comments as needed.

COMPETENCY	EXCEEDS	MEETS	AREA FOR DEVELOPMENT	COMMENTS
Role Mastery – Demonstrates a clear understanding of role responsibilities and applies knowledge effectively to deliver results.	☐	☐	☐	
Results & Accountability – Consistently delivers on commitments, manages priorities effectively, and produces results aligned with expectations.	☐	☐	☐	
Quality of Work – Produces accurate, thorough, and reliable work with attention to detail and minimal rework required.	☐	☐	☐	
Judgment & Decision Making – Applies sound judgment, evaluates options thoughtfully, and takes appropriate action to move work forward.	☐	☐	☐	
Professional Presence – Demonstrates integrity, respect, and professionalism in all interactions; responds constructively to feedback.	☐	☐	☐	
Ownership & Initiative – Takes proactive responsibility for work, seeks solutions, and steps forward to address challenges and opportunities.	☐	☐	☐	
Collaboration & Team Contribution – Builds positive working relationships, contributes to team success, and supports a positive external client experience.	☐	☐	☐	
Communication & Clarity – Communicates clearly and effectively, verbally and in writing; listens actively and ensures mutual understanding.	☐	☐	☐	
Reliability & Work Discipline – Demonstrates dependability through consistent attendance, timeliness, and responsible work habits.	☐	☐	☐	
Growth & Development – Actively engages in learning, seeks feedback, and applies development opportunities to improve performance.	☐	☐	☐	

5 GOALS & RESULTS

List key objectives for the performance period. Objectives should be set at the beginning of the period through a collaborative process that includes the employee and the reporting manager.

Employees complete *Results Achieved* as part of self-appraisal; the manager reviews and comments. Where available, include quantitative indicators.

PERFORMANCE OBJECTIVES	RESULTS ACHIEVED

Add additional rows as needed.

OPPORTUNITIES FOR DEVELOPMENT

REVIEWER'S COMMENTS

Overall Rating — please select one

- ◯ **Exceeds Expectations** — Employee is seen as a role model and consistently exceeds the expectations of the role.
- ◯ **Meets Expectations** — Employee demonstrates consistent competence and may exceed in some areas of performance.
- ◯ **Does Not Consistently Meet Expectations** — Sustained improvement needed to meet the expectations of the job.

6 FOLLOW-UP & NEXT STEPS

NEXT CHECK-IN DATE

METHOD (1:1, written, formal review)

ADDITIONAL NOTES

7 ACKNOWLEDGMENT

> *Signatures confirm this conversation occurred — not necessarily agreement with its contents. The employee may attach a written response.*

EMPLOYEE SIGNATURE **DATE**

MANAGER SIGNATURE **DATE**

HR / OPERATIONS WITNESS (if applicable) **DATE**

DAY ONE

LEADERSHIP TOOLS

PERFORMANCE ACTION PLAN

BASED OFF OF **PERFORMANCE BEGINS ON DAY ONE**

BY KRISTA HAYES, SPHR

Performance Action Plan

EMPLOYEE NAME

MANAGER NAME

ROLE / TITLE

DATE OF MEETING

DEPARTMENT

REVIEW PERIOD / TIMEFRAME

PURPOSE

This Action Plan is a shared commitment between the employee and manager to address identified performance challenges and chart a clear path forward. It is intended to be collaborative, transparent, and solution-focused. Each challenge below includes specific action steps, the employee's response and acknowledgment, and agreed-upon target dates. Progress will be reviewed at each scheduled check-in — successful completion of this plan is the shared goal.

ACTION PLAN

1 Performance Challenge

	ACTION STEPS	EMPLOYEE RESPONSE / COMMENTS	TARGET DATE(S)
1			
2			
3			

MANAGER SIGN-OFF

DATE

2 Performance Challenge

	ACTION STEPS	EMPLOYEE RESPONSE / COMMENTS	TARGET DATE(S)
1			
2			
3			

MANAGER SIGN-OFF

DATE

3 Performance Challenge

	ACTION STEPS	EMPLOYEE RESPONSE / COMMENTS	TARGET DATE(S)
1			
2			
3			

MANAGER SIGN-OFF

DATE

ADDITIONAL NOTES & CONTEXT

Use this space for additional context, agreed-upon support, or resources to be provided.

ACKNOWLEDGMENT

By signing below, both parties confirm that this Action Plan has been reviewed and discussed. Employee signature indicates acknowledgment of the plan — not necessarily agreement with every element. The employee may attach a written response.

EMPLOYEE SIGNATURE **DATE**

MANAGER SIGNATURE **DATE**

HR / OPERATIONS REPRESENTATIVE (if applicable) **DATE**

PERFORMANCE EXPERIENCE LIFE CYCLE

Renata's performance journey

One shared path through the first six months — then two honest outcomes, each handled with clarity and care.

THE FIRST SIX MONTHS — SHARED BY EVERYONE

01 Onboarding — Week one — the pre-day-five conversation. — PERFORMANCE CONVERSATION RECORD

02 Micro 1-1s — Ongoing — scheduled and impromptu. — PERFORMANCE CONVERSATION RECORD

03 60-day performance check-in — Goals set, gaps addressed, documented. — PERFORMANCE CONVERSATION RECORD

04 120-day development conversation — Career goals and stretch opportunities. — PERFORMANCE CONVERSATION RECORD

DECISION POINT

The 6-month outcome

STRONG PERFORMANCE

Formal performance review
Results confirmed, strengths named.
— PERFORMANCE CONVERSATION RECORD

Total rewards conversation
Compensation aligned to contribution.
— PERFORMANCE CONVERSATION RECORD

Career path conversation
Milestones toward a project-lead role.
— PERFORMANCE CONVERSATION RECORD

OUTCOME

Retained, engaged, growing

UNDERPERFORMANCE

Gap named directly
Specific, documented — not a surprise.
— PERFORMANCE CONVERSATION RECORD

30-day action plan set
Clear goals, weekly check-ins.
— PERFORMANCE ACTION PLAN

30-day progress review
Improvement assessed, next step decided.
— PERFORMANCE CONVERSATION RECORD

OUTCOME

Recovery, extended support, or a purposeful transition

Handled with clarity and care.

Shared path — every employee · Strong-performance path · Underperformance path

TOOL NAME = the tool used at that stage