

PERFORMANCE MANAGEMENT CHECKLIST

Documentation

- Position Description
 - Current and signed copy retained on employee file and reviewed at least annually
- Signed Contract
 - Retained on file for all employees
- Policies & Procedures
 - Has a Performance Management policy/procedure been implemented?
 - Do you have a standard warning template?
 - Do you have a Performance Improvement Plan template?
 - Do you have a grievance policy?
 - Are your employees aware of all policies and procedures and are these readily available to all employees?

New Starter/Probation

- Induction
 - Has an induction been completed and retained on file?
 - Has the company Induction been completed?
 - Are employees provided with an orientation?
 - Is a copy of induction/orientation checklists completed and retained on file?
- Probation
 - Is the probation period 3 or 6 months and documented?
 - Does the contract have the option to extend probation?
 - Do you have a formal letter to issue upon successful/unsuccessful completion of probation?
 - Is there a review procedure for probation? If so, how often are these undertaken? Is there a record of probationary reviews kept?

Performance Management

- Process
 - Note if this is an informal or formal process
 - Ensure all documentation is maintained on file and copies of signed letters or documents are also kept along with copies provided to the employee.
 - Are employees afforded a support person? Do you send details about the role of the support person?

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Performance Reviews

- Areas to consider
 - KPI's, achievements, areas for development and succession planning
- Goal Setting
 - SMART Goals (4 - 5) with a current or future focus that align with department and company goals
- Training & Development
 - Linked to future career goals, potential promotion and upskilling, areas for improvement, change in business needs, past performance issues, details of training to be delivered – online, team-based, external etc.

Management

- Training
 - Are all managers trained in the Performance Management process?
 - When in doubt do they know where or who to go to for support?

Need a better solution?

- Speak to us about Performance Management Online
 - Automate the process to make sure you never miss a review or waste time on paperwork again
 - Consider online probation monthly, quarterly, and annual reviews
 - Customise your reviews to meet company values, standards and key expectations for each role
 - 24/7 access to all reports - past and present , stored in the cloud for easy access