|  |  |
| --- | --- |
| **Employee Name:** | **Manager’s Name:** |
| HR Manager’s Name: | **Initial Review Meeting Date:** |

As you go through your report, various action items may come up through your discussion.  These are actions that will help the employee act on the things you are discussing – make progress on personal goals.

Please record an action item you both can commit to in the Action Plan below.

We recommend taking on only one item so you can stay focused and make progress.  When you have made sufficient progress or the item has been completed, you can move to another item.

Action items don’t need to be time-consuming or costly.  In fact, picking a small and achievable item should do the job, as long as you are making progress.   For example, 10 minutes of coaching once a week may be enough to help the employee become better at a specific skill.

To keep this item active and on your agenda, meeting for a few minutes to review progress every few weeks is suggested.  In those meetings, you can decide what needs to be done to move the action item forward by the time you talk next.

Wishing you success!

**Action 1: Involvement**

Discussion: Please click to and examine the Section Called Involvement. What items score low and what items score differently between the manager and the employee?

Please discuss and complete this initial section:

|  |
| --- |
| **Action One Involvement:**  **Action Plan:** |
| **Value to Employee:**  **Value to Organization:** |
| **Barriers to Success:**  **Strategy to Overcome the Barriers to Success:** |
| **Support Required:**  Involvement from next-level manager/Human Resources:  Ability to devote time to actions:  Skills in having in-depth conversations:  Budget: |
| **Indicators of Progress**  1.  2.  3. |

**Action 2: Job Content**

Discussion: Please click to and examine the Section Called Job Content. What items score low and what items score differently between the manager and the employee?

Please discuss and complete this section:

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| --- |
| **Action Two - Job Content:**  **Action Plan:** |
| **Value to Employee:**  **Value to Organization:** |
| **Barriers to Success:**  **Strategy to Overcome the Barriers to Success:** |
| **Support Required:**  Involvement from next-level manager/Human Resources:  Ability to devote time to actions:  Skills in having in-depth conversations:  Budget: |
| **Indicators of Progress**  1.  2.  3. |

**Action 3: Management Practices**

Discussion: Please click to and examine the Section Called Management Practices. What items score low and what items score differently between the manager and the employee?

Please discuss and complete this section:

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| --- |
| **Action Three – Management Practices:**  **Action Plan:** |
| **Value to Employee:**  **Value to Organization:** |
| **Barriers to Success:**  **Strategy to Overcome the Barriers to Success:** |
| **Support Required:**  Involvement from next-level manager/Human Resources:  Ability to devote time to actions:  Skills in having in-depth conversations:  Budget: |
| **Indicators of Progress**  1.  2.  3. |

**Action 4: Feedback and Growth**

Discussion: Please click to and examine the Section Called Feedback and Growth. What items score low and what items score differently between the manager and the employee?

Please discuss and complete this section:

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| --- |
| **Action Four – Feedback and Growth:**  **Action Plan:** |
| **Value to Employee:**  **Value to Organization:** |
| **Barriers to Success:**  **Strategy to Overcome the Barriers to Success:** |
| **Support Required:**  Involvement from next-level manager/Human Resources:  Ability to devote time to actions:  Skills in having in-depth conversations:  Budget: |
| **Indicators of Progress**  1.  2.  3. |

**Action 5: Overall Views**

Discussion: Please click to and examine the Section Called Overall Views. What items score low and what items score differently between the manager and the employee?

Please discuss and complete this section:

|  |
| --- |
| **Action Five – Overall Views:**  **Action Plan:** |
| **Value to Employee:**  **Value to Organization:** |
| **Barriers to Success:**  **Strategy to Overcome the Barriers to Success:** |
| **Support Required:**  Involvement from next-level manager/Human Resources:  Ability to devote time to actions:  Skills in having in-depth conversations:  Budget: |
| **Indicators of Progress**  1.  2.  3. |

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| --- |
| **Schedule of Review Meetings:**  Date: Date: Date: |
| Employee Signature Manager’s Signature Date: |