

ACTION PLAN

Complete the portion from your perspective. Using this format, plan your discussion to review the feedback you plan to provide.

Opening:

Thank employee for coming.

Explain objective of meeting (keep in mind the discussion model objectives):

Explain plan for discussion:

You may say something

like...

I'd like to discuss your performance overall and then review your performance one objective at a time, with you providing your feedback first and then I will provide my observations. Once we have discussed your objectives, I will discuss training and development opportunities and update our objectives for the next plan. What questions or suggestion do you have for our discussion today?

Put plan in your own words:

Ask:

Overall, how do you feel you performed over the past performance appraisal period?

Overall, I believe your performance was...

ACTION PLAN (CONT'D)

Note observations and specific examples on each objective here:

First, ask the person for his or her self-evaluation on that objective, and why; and then share your observations.

1. _____ 5 4 3 2 1

Positive observations:

Areas for improvement:

Ask: What suggestion do you have for improvement?

Your suggestions for how to improve (What I'd like to see in the future is... this will result in...)

2. _____ 5 4 3 2 1

Positive observations:

Areas for improvement:

Ask: What suggestion do you have for improvement?

Your suggestions for how to improve (What I'd like to see in the future is... this will result in...)

ACTION PLAN (CONT'D)

3. _____ 5 □ 4 □ 3 □ 2 □ 1 □

Positive observations:

Areas for improvement:

Ask: What suggestion do you have for improvement?

Your suggestions for how to improve (What I'd like to see in the future is... this will result in...)

There may be a plan from the prior year to review for the employee's training and development; if so, review those objectives from an action plan similar to the example below and then complete a new plan based on the feedback from this discussion.

Employee Development and Career Planning

What is employee's career objective?

What is a realistic time frame for achieving this objective?

What additional skills and training will be necessary to attain this career path/objective?

What additional skills would assist in how successfully the goals/objectives are attained (better communications, negotiations, leadership, diplomacy, respect for others, teamwork, etc.)

ACTION PLAN (CONT'D)

Career Development Action Plan

Identify the development area/skills the employee must have to meet desired performance in the current position and his or her career objective. Determine the action steps and resources needed to accomplish this goal, target completion date, and measurements for successful achievement.

Target Skill or Development Area	Action Steps	Resources Required	Target Completion Date	Measure of Success	Result Achieved? Yes/No

Develop new objectives and goals for the upcoming appraisal period. Collaborate with employee on objectives and goals.

Determine what additional responsibilities and opportunities, if any, should be offered:
