

# Assess performance in a role



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Use this worksheet to weigh performance against a role description and prepare for a conversation with an employee.

Performance reviews can help you get the best from your staff, find ways to improve your management approach, and keep your business running smoothly. They are also an important part of identifying and managing poor performance which, if not addressed, could negatively affect your business.

Formal performance reviews are usually done once or twice a year, but you might like to check in with new employees earlier to see how they are settling in. Regular check-ins are a great way to give and receive feedback while it's relevant — and to hear or address any concerns before problems arise. They show employees you're engaged and know what's going on.

This worksheet asks you to reflect on areas of a role description an employee is performing well and not-so-well. If you don't work closely with the person, seek input from people who do — whether other managers, staff, suppliers, clients or someone else.

**Grab a copy of the person's role description, find a quiet space, and make some notes on this sheet.**

Prepare your notes in private, then book a time for a conversation about performance.

**This is a great tool if:**

- You want a process for regularly reviewing staff performance.
- Your team is growing and you want to formalise the way you review performance.
- You might have an underperforming team member, and want to understand the situation fully before considering action to take.

**It will take around 30 minutes.**

Use this page to focus your thoughts and prepare for the performance review.

Employee name:

Role title:

Date:

## 1. Performing well

Read through the person's role description. Since your last formal performance review, what were their key strengths?

Copy these directly from the role description. Provide specific examples of what they do well, eg on target sales, a great attitude.

## 2. Underperforming

Looking at the role description again, what areas are not yet being performed fully or being underperformed?

Don't include one-off mistakes — only tasks they are consistently not performing well. Copy these directly from the role description and provide specific examples, eg health and safety guidelines not being followed on building site.

**TIP:** Get input from the person's manager or co-workers if you don't work with them closely.

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## 3. Achievements

**Since the last formal performance review, what are their standout achievements? Have they gone above and beyond in any areas?**

Provide specific examples, eg delivering a project really well, stepping up at a time of need, managing a heavy workload, finding a better way to approach common challenges.

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## 4. Focus areas

**What do you want this person to work on?**

If there are a number of areas to improve, pick one or two specific things so they're not overwhelmed. Consider timeframes and be realistic. Focus areas could include strengthening communication skills, learning to use specific tools to help them do their job, or getting to meetings on time.

## 5. Goals

**What goals do you have for them? What do you know about their goals?**

Ideally, goals will be developed together with the employee — goals that are important to the business and to them. But first, get your thoughts organised so you have a good starting point when you meet for the performance conversation. Goals could be something like meeting sales targets or improve week-by-week on the time it takes to finish a task.

## 6. Before the performance conversation

**Use your worksheet notes so far to fill out the conversation guide on the next page. That's the part of this sheet you can take into the performance conversation.**

Consider these tips for great outcomes:

- Approach the conversation ready to celebrate where the employee is performing well and set expectations where they are not yet performing well or underperforming.
- Think about what you want to get out of the conversation, eg to explain rationale for a promotion or performance management plan, to hear acknowledgement of underperformance, or get agreement on next steps.
- Explain the wider impact of performance – why it matters when workers do well or underperform.
- Be ready to address issues objectively. Put aside any personal, emotional opinions of the situation.
- Make sure the employee has a chance to explain their perspective. Open-ended questions are great for this, eg “what’s your take on that?” instead of “does that seem fair?”.
- Be open to feedback about your own performance. Raising the issue of performance can bring questions and feedback to the surface.
- Ask for input from the employee when setting goals. They may not be motivated to reach goals they haven’t set themselves.

Use this page as a conversation framework. Add some notes in each section, then take it when you meet with your employee.

Employee name:

Role title:

Date:

Performing well:

Focus areas:

Performing less well:

Your goals for them, and their own goals:

Achievements:

Other:

Use this page to prepare a record of your conversation.

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## 7. After the conversation

Type up some notes and email them to the employee. Be sure to include any goals and focus areas you agreed on.

It's important to keep a record of their performance assessment and conversation. Promptly send relevant notes to your employee to:

- help them understand where they need to focus and why
- remind you both about specific commitments you need to follow through on
- encourage both of you to take responsibility for any areas of underperformance you have the ability to improve
- give you a great starting point for future performance conversations, eg we agreed to these focus areas, with this timeline, under these assumptions.

Check out **Managing people's performance** on [business.govt.nz](https://business.govt.nz) for more guidance on performance-based management.

Learn more about how management and underperformance can be connected on the **Performance issues: What to check** page of [business.govt.nz](https://business.govt.nz).