

## Performance & Growth Plan

Name		Month/Year	
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## Expectations & Annual Goals (should align with job spec)

### Key Objective/s 360

List 3–5 high-impact outcomes expected over the course of the year. These should reflect what’s required of the individual’s core contribution to team and business success, as well as any specific responsibilities outlined in their job specification. Include both performance and growth-oriented goals. These may be quantitative (e.g. revenue targets, project completions) or qualitative (e.g. collaboration, innovation, leadership development).

This section is primarily employer-led, outlining what success looks like in the role. However, it is also designed to be a **shared reference point** between the manager and employee. At the end of this section, the employee is encouraged to add a brief statement outlining **what they personally hope to achieve** during the year—whether related to skills development, career aspirations, or areas they’re passionate about growing in. Goals are more effective when co-created and whilst any performance plan is first and foremost for the employer, employees who feel they’ve shaped their goals are more likely to commit to them. Try to include at least one goal that’s come from the employee.

The **Performance & Growth Plan** should act as a touchstone throughout the year—providing direction, clarity, and space for open conversation around performance, impact, and potential. To

make it meaningful in practice, it's recommended that managers hold **weekly one-to-one check-ins** (informal) and **more structured monthly reviews**, creating regular opportunities to reflect, realign, and support growth.

These goals should determine the monthly assessment areas you choose to track, as per the concept outlined below.

## Monthly Performance & Progression

ASSESSMENT AREA	1 UNACCEPTABLE	2 SOME GAPS	3 SATISFACTORY	4 GOOD	5 EXCEPTIONAL	ACTUAL
Assessment Area 1						
Assessment Area 2						
Assessment Area 3						
Assessment Area 4						
Assessment Area 5						

List the assessment areas by importance. What does someone truly need to contribute to be successful in this role? Some dimensions will be quantitative i.e. specific goals, or targets, others qualitative. Weighting: Assign a priority score to each assessment area one to five, with five being most important.

Use insights here to identify specific skills or behaviours to develop in the next section.

### What Each Rating Level Means

**5 – Excellent:** Consistently exceeds expectations. Delivers with impact and demonstrates strong future potential. In hiring: Gives strong, confident responses with clear evidence of success and performance above standard.

**4 – Good:** Meets expectations well and occasionally exceeds them. In hiring: Responses are structured and confident, demonstrating capability and potential.

**3 – Satisfactory:** Meets the core requirements. Some development may still be needed. In hiring: Acceptable responses that meet basic expectations but lack depth.

**2 – Below Standard / Concerns:** Partially meets expectations. Noticeable gaps; development required. In hiring: Responses are vague or lack structure and clarity.

**1 – Unacceptable:** Falls short of expectations. Major gaps; not currently fit for role or advancement. In hiring: Responses are weak, unclear, or inconsistent.

The concept being that in each of the cell items, associated with Ratings of 1-5, that a specific description or more often number, percentage is associated with the rating – for example what does a GOOD or BAD rating mean, for a particular assessment area.

And at the end of the month, the employee performance is entered appropriately – you may wish to ask them to enter their performance details into the form making it more inclusive however appreciate it's you, not them who needs to determine their actual performance.

It needs to be clear to both sides how well they are tracking through the year.

Based on the performance review, which strengths are contributing to success? Which gaps are limiting effectiveness—and are they due to skill, mindset, or interest?"

### **Responsibilities, behaviours and specific skills**

The primary responsibilities, behaviours, and specific skills are the key factors most likely to determine the success or failure of the job holder.

You should identify the responsibilities and behaviours that most directly drive the outcomes you expect the individual to deliver.

Aim to list five or more of the most critical responsibilities—these are the tasks and accountabilities that, if performed well, would indicate strong performance in the role.

These responsibilities are typically the ones for which the job holder will be most accountable, and they will form the basis of informal performance conversations as well as formal appraisals.

In addition, consider including a list of specific skills and behaviours that contribute to achieving the stated goals and meeting the expectations of the role. While the core assessment areas may focus on the top five objectives, the broader list of skills and behaviours will likely contain 15 to 20 items.

### **Identifying & addressing gaps**

When assessing people, focus on the factors that most directly drive performance in the role. Identify both skill-based and behavioural gaps, as well as opportunities for improvement. High performance is rarely the result of a single trait—it's shaped by a combination of skills, mindset, and behaviours. That's why it's important to look closely at how someone applies themselves in practice. This is especially true for those already performing well, where the greatest gains are often marginal ones. Once gaps are identified, action can follow—this might include targeted training, coaching, mentoring, or adjusting responsibilities to stretch and support growth. The right

intervention depends on the individual and the specific context, but even small shifts can lead to meaningful improvement.

If the job spec for the employee, has not just an essential list of qualities required of the job holder but also a desirable skills one then these are ideal material for identifying personal development goals and SMART learning objectives.

## Competencies, Strengths & Talents

Both you and the employee should be clear on their specific strengths and weaknesses, and how these may impact their success in the role and relationships with others.

Strengths might be generic - such as being analytical—or more specific, like expertise in a programming language, financial modelling, product development, or regulatory reporting. Weaknesses should be acknowledged as areas to watch, develop, or find workarounds for.

Competencies include: Achievement orientated, analytical ability, communication skills (oral, written, presentation), creativity / innovation, decision-making, Integrity / honesty, flexibility / adaptability, initiative, interpersonal skills, leadership, management, persuasiveness / influencing, planning & organising, problem solving, team builder / player, time management.

## Emotional Intelligence

Self-awareness: How familiar are they with their own strengths and weaknesses, their biases and preferences? How well are they aware of their mood and energy levels?

Self-management aka self-discipline: How well they apply themselves? Motivations: How well are their motivations aligned with the job, and how consistent are they?

Social awareness: Social management: Motivations:

## Feedback & Support

**Check in** to understand things like: “What’s going well?”, “What’s not going so well?”, “How are you doing?”, “Is there anything you’re struggling with or that’s been troubling you?”, and “How are things working within the team?”.

**Ask:** What can we do to help you perform at your best? How can we better support the team?

If your job spec outlines behaviours or outcomes to avoid (e.g., “avoid hiring more of the same type”), bring those into the **feedback & support** part of the performance plan to ensure culture and values stay front of mind.

Encourage honest self-reflection and share your own observations too. You might also gather feedback from colleagues to build a fuller picture. Go beyond performance—tune into what really matters to them. What are their goals, motivations, and priorities? Not everyone is chasing a promotion; some just want to do meaningful work and feel valued. Take a genuine interest in who they are, not just what they do. When people feel seen, heard, and supported, they tend to show up with more energy, commitment, and creativity.

Based on the themes from your feedback conversations, translate priorities into any areas requiring adjustment, support or SMART learning goals...

## Smart Learning

Choose learning actions that directly address the gaps or aspirations identified in the previous two sections, and make them specific.

What specific, measurable, achievable, realistic, and time-bound (SMART) learning expectations do you have of them, and what do they have of themselves. Focus their learning efforts on what matters most now—closing immediate skill gaps while also supporting longer-term career goals. Understand how they prefer to learn—whether that’s on the job, through mentoring, or via quick resources like videos and whitepapers. With limited time and budget, smart learning means using what you have to boost performance, consider having topics discussed or activities at team meetings which may raise individual and team-based skill developments, and enable career mobility.

## Monthly Summary:

- Apply and continually update a rolling summary:
- Progress on key goals
- Key issues or blockers
- Strengths observed this month

- Notable feedback
- Priority development action
- Focus for next month

## Addendum

**When:** Annual goals and expectations should ideally be discussed and agreed upon before the start of the year. Monthly goals should be reviewed in a meeting held as early as possible at the start of each month. This meeting should cover performance from the previous month, surface any issues or feedback from both sides—including areas for improvement—and set clear objectives for the month ahead.

**Competencies:** Achievement Orientated, Analytical Ability, Communication Skills, Creativity & Innovation, Decision-Making Skills, Integrity / Honesty, Flexibility / Adaptability, Initiative, Interpersonal Skills, Leadership, Management Skills, Persuasiveness / Influencing, Planning & Organising, Problem-Solving Skills, Team Building / Teamwork, Time Management.

**Strengths:** Achiever, Activator, Adaptability, Analytical, Arranger, Belief, Command, Communication, Competition, Connectedness, Consistency (formerly Fairness), Context, Deliberative, Developer, Discipline, Empathy, Focus, Futuristic, Harmony, Ideation, Includer, Individualization, Input, Intellection, Learner, Maximizer, Positivity, Relator, Responsibility, Restorative, Self-Assurance, Significance, Strategic, Woo (Winning Others Over).

### **Best Practice:** Strengths-Based Management

Gallup research shows that great managers focus on people's strengths and manage them as individuals. To do this well, you need to understand what your team members naturally do well and what energises them.

Strengths are things we naturally excel at and enjoy. When people work in their strength zones, they tend to be more confident, engaged, productive, and focused leading to better performance and greater enjoyment.

Weaknesses are the opposite. They're areas we struggle with or find draining, which can lead to frustration, distraction, and underperformance.

For you as a manager, this means:

1. Align people's strengths with roles. Give people work that plays to their strengths whenever possible.
2. Support development. Help team members grow in areas that matter, turning weaknesses into new strengths.

3. Find smart workarounds. If development isn't the best route, pair people up or redistribute tasks so everyone plays to their strengths.

The best managers bring out the best in others—by managing the individual, not just the role.

At the end of each month, review outcomes, reflect on assessment ratings, update skills and development actions, and carry forward the next set of goals or focus areas. The plan is dynamic and should evolve with the individual's journey.