

Tab 1


👉 Syncing With Your Manager On Performance

Template

- **Who:** to share with your manager.
- **When:** every month to keep it lightweight.
- **How:** fill in, share with your manager, book a meeting, run through together.
- **Why:** it makes sure you're on the same page, avoids problems and surprises at performance reviews.

Individual Performance (per report)
Name: <i>[Team member's name]</i>
Going Well
<i>[Recent examples of impactful work, linked to expectations. Include measurable outcomes.]</i>
Areas for Growth
<i>[Where they can improve, tied to expectations. Note how you're supporting.]</i>
Overall Performance
<i>[Your assessment of their performance. Ask for manager alignment.]</i>
Anything Else
<i>[Useful context for your manager (e.g., external factors affecting performance).]</i>

Tips

- Use notes from  Performance and Personal Development Session Template to save time when filling this out.

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