

# QUARTERLY PERFORMANCE CHECK-IN

## PURPOSE

Use this template to layout the topics of discussion for quarterly performance conversations.

### Reflect on the past:

- What were the highlights of your past month/quarter?
- What did not go well last month/quarter?
- What are your goals for the upcoming month/quarter?

### Make a plan:

- What would make the next 60-90 days successful for you at work?
- What kind of support do you need to achieve your goals?
- How will you measure or track your progress on these goals?
- What steps will you take to attain these goals?

### Look to the future:

- What are your goals for next quarter?
- Do you understand how your personal goals align with team goals?

### Good:

Managers reflect on past performance, provide suggestions, and end with a summary of the meeting.

### Best:

Employees and managers review performance, collaboratively discuss action plans, and look to the future.