Performance conversation record

An organizational aid for recording a performance conversation, shared expectations, agreed next steps, and follow-up.

Organizational aid only. This template is not legal advice or a substitute for qualified counsel.

Employee name

Manager name

Conversation date

01 Performance conversation notes

What work topic or expectation is being discussed? Record the main points in neutral, specific language.

Examples and expectations

Record observable examples, then write down what is expected going forward.

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02 Specific examples

For each example, note the situation or date, what happened, and any relevant impact.

03 Expectations discussed

What should happen going forward? Note the expected work, timing, quality, and any support or resources discussed.

Employee perspective and understanding

Capture the employee’s perspective and the points both people agree should be remembered.

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04 Employee perspective

What context, questions, concerns, or support needs did the employee share?

05 Shared understanding

What did both people agree should be remembered from this conversation?

Next steps and follow-up

Record each agreed action with a clear owner and due date. Add follow-up dates so the next check-in is easy to find.

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06 Agreed next steps

Next step 1

Agreed action

Responsible person

Due date

Next step 2

Agreed action

Responsible person

Due date

Next step 3

Agreed action

Responsible person

Due date

07 Follow-up dates

Schedule one or more follow-ups to review progress and discuss any support needed.

Follow-up date 1

Follow-up date 2

Follow-up date 3

Additional notes

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