Quarterly performance check-in

A 20-minute conversation, four times a year. The employee fills in the first column before the meeting; the manager adds notes during it.

Employee name: _____

Manager: _____

Quarter: _____

Date: _____

Question	Employee	Manager
What went well this quarter?		
What got in the way?		
Progress on each goal (on track / at risk / done)		
What support do you need?		
Schedule, hours or time off concerns		
Focus for next quarter		

Agreed next steps: _____

Next check-in date: _____

_____ _____

Employee initials Date

_____ _____

Manager initials Date

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