

Performance Check-In Template

A simple review for small teams. No scores, no ranking.

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What this is

A two-way check-in you can run once or twice a year. Four questions for the employee, four for the manager, filled out separately and then talked through together. There is no 1 to 5 scale and nobody gets ranked against anybody else.

People still need to know where they stand, so the form keeps a marker. It just uses one a manager can actually answer, and it sits after the written feedback instead of at the top.

Budget about 30 minutes of writing per person and an hour for the conversation.

Start here: what are you measuring?

This is the step worth doing before you look at the rest of the form.

For each role, write down the three to five things that person owns and what doing them well looks like. Rough is fine. A rating is an answer to a question, and if nobody has written the question down, the rating is a guess.

If you do not have job descriptions with measurable results yet, you are in good company, and this is a better first project than a review cycle. A useful way in: have each person draft the description of their own role, then work through it together. You will learn a lot about where people think their job starts and stops.

There is space for this at the top of the form. Fill it in with the employee before the review, not during it.

Already using a rating scale?

You are not doing it wrong. You built something, which puts you ahead of most small businesses, and you cannot improve a process that does not exist. Treat this as an iteration: run a version, ask your team what was a waste of their time, fix that part next cycle.

How to run it

1. Fill in the role section with each person, ahead of time.
2. Pick your marker (below) and set your dates. Give people at least two weeks.
3. The employee fills out Section 1 only, then tells their manager it is done.
4. The manager sets their mark at the end of Section 2 first, before reading Section 1. Then writes the rest.
5. Sit down together. Fill in Section 4 during the conversation or right after.
6. Both sign. Save a PDF somewhere central and consistent.

Two rules that matter more than the form does

- **The manager marks before reading the self-assessment.** Once you have read someone's version of their own year, you cannot unread it. The gap between two independent reads is the most useful conversation in the whole exercise.

- **Nothing in the write-up should be news.** If a review is the first time someone is hearing that something is not landing, that is about the last six months, not about the form. A once-a-year document cannot carry conversations that did not happen.

Choose your marker

Pick one and use it for everyone. The form is set up with Reliance. If you choose another, replace the four lines in Section 1 and Section 2.

Reliance. Needs regular support, delivers reliably, trusted beyond the role, others rely on them. Answers "where do I stand" in terms people care about, and it reads well out loud in a 1:1. The most intuitive of the three, and the most subjective.

Trajectory in role. Learning, doing, owning, multiplying (meaning they make others better at it). Separates "new" from "not performing," which matters if you have been hiring. Train managers not to treat it as a marker of tenure.

GWC. Does this person get it, want it, and have the capacity to do it? Three yes or no answers, from the People Analyzer in EOS (Gino Wickman, Traction). The sharpest of the three, because a no on "wants it" is a different conversation than a no on "capacity." No middle ground to hide in.

Calibrate before you roll it out

If you have more than one manager, get them together for an hour first. Take three real people, have each manager mark them independently, then compare and talk it through until you agree what the words mean. Four managers will read the same person four different ways unless you do this on purpose.

If you are the only manager, do the same thing on your own: mark everyone in one sitting rather than one at a time, so you are holding a consistent bar instead of drifting as you go.

Performance Check-In

Employee		Manager	
Role		Review period	
Date of conversation		Marker in use	

What this role owns

Three to five things this person is responsible for, and what doing them well looks like. Fill this in together before the review. Everything below is assessed against this, not against a general impression.

	What this person owns	What doing it well looks like
1.		
2.		
3.		
4.		
5.		

What this is

A structured check-in, not a grade. There are no numeric scores and no ranking against your coworkers. You and your manager each write your own take on how this period went, and each mark where you see your standing in the role today. That mark exists so you leave the conversation clear on where you stand instead of guessing at it.

Managers: go to Overall Standing at the end of Section 2 and set your mark before you read Section 1. Then come back and work through the rest.

Section 1 | Employee

Fill this out on your own, before your manager writes Section 2. Let them know when you are done.

1. Looking at what this role owns, where did your work land this period? Call out what went well and what did not.

Click here to add your response.

2. What are you most proud of? Be specific.

Click here to add your response.

3. What do you most want to get better at, and why does it matter to you?

Click here to add your response.

4. What would help you do your best work? Include what is working in how you are managed and what could be better.

Click here to add your response.

Where you see yourself today

Mark where you feel you stand in your role right now. There is no wrong answer and this is not scored. Your manager marks the same thing separately, and comparing the two is part of the conversation. If you are new to the role, the first option is normal and expected.

- ☐ **I need regular support.** I am still leaning on my manager for direction or review on most of my work.
- ☐ **I deliver reliably.** I handle my core responsibilities well without close oversight.
- ☐ **I take on more than my role.** I regularly pick up work beyond what my role formally covers.
- ☐ **Others rely on me.** People outside my team come to me, and I help raise the level of those around me.

Briefly, why this mark:

Click here to add your response.

Section 2 | Manager

Fill this out once Section 1 is complete. Set your Overall Standing mark at the end of this section first, before reading the employee's answers. Finish the section before you sit down together.

Use specific, dated examples. Hold this to the same standard as anything else that goes in someone's file.

1. Against what this role owns, how did the work land this period? Include specific examples of both what went well and what missed.

Click here to add your response.

2. What did they do that you want more of?

Click here to add your response.

3. What are the one or two most important things for them to develop, and why do those matter in this role?

Click here to add your response.

4. What will you do to support that? Include anything you plan to change on your end.

Click here to add your response.

Overall standing

Separate from the feedback above, mark where this person stands in their role today. This is not a summary of what you wrote. It is your read on what you can rely on them for right now. Someone can have real development feedback and still be a strong performer. If they are new to the role, the first option is normal and expected.

- ☐ **Needs regular support.** I am guiding day-to-day work, or reviewing it closely before it goes out.
- ☐ **Delivers reliably.** I can hand off work within their role and trust it will get done well.
- ☐ **Trusted beyond the role.** I give them things outside their defined scope because they handle them.
- ☐ **Others rely on them.** People outside our team seek them out, and they raise the level of those around them.

Briefly, why this mark:

Click here to add your response.

Section 3 | Values Check (optional)

Only worth doing if your company has written values that people actually recognize. An empty values exercise is worse than none. Managers, set your marks before reading the employee's.

+ living it well +/- mixed, room to grow - not currently aligned

Anything other than a plain + needs an example below. This scale comes from the People Analyzer in EOS (Gino Wickman, Traction).

Value	Employee	Manager

Employee, examples for any mark other than +:

Click here to add your response.

Manager, examples for any mark other than +:

Click here to add your response.

Section 4 | The Conversation

Fill this out together during the meeting, or finalize right after so you can stay present while you are talking.

Key points discussed and where you landed:

Click here to add your response.

Goals for the next period. Two or three, each with a measurable result and a date. Revisit these at the next check-in.

Click here to add your response.

Click here to add your response.

Click here to add your response.

Follow-up actions and who owns them:

Click here to add your response.

Section 5 | Sign Off

Signing confirms this conversation took place and was discussed together. It is an acknowledgment that it happened, not necessarily agreement with everything written above.

Employee	Manager
Name	Name
Date	Date

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Free to use and adapt inside your own business. Please don't resell it. GWC and the core values scale are from the EOS People Analyzer (Gino Wickman, Traction).