

Performance Management Checklist

A design and operating review for performance management. The test of a performance system is whether a manager can complete it honestly in the time available, and whether it helps them make decisions they were previously avoiding.

How to use this tool

1. Review the design first: most operating failures are design failures.
2. Test the cycle against the time a manager genuinely has.
3. Agree positions on the hard cases before the cycle opens.
4. Report system measures to the leadership team, not only to HR.

1. Design

Item	In place	Partial	Absent	Action owner
Between five and seven objectives per person, observably written				
Objectives set once and reviewed quarterly				
One rating scale with written definitions and examples				
Development conversations separated from reward conversations				
Manager guidance fits on two pages with sample wording				

2. Operation

Item	In place	Partial	Absent	Action owner
Objectives are agreed within the first month of the cycle				
Check-ins are recorded in one place				
Mid-cycle changes to objectives are permitted and documented				
Employees can see their own record				
Calibration is proportionate to organization size				

3. Hard cases

Item	In place	Partial	Absent	Action owner
A stated position exists for objectives that changed mid-year				
A position exists for strong performers in failing teams				
Behaviour, not only output, is assessed				
A documented route exists for disagreement				
Undocumented underperformance has a defined starting process				

4. Manager capability

Item	In place	Partial	Absent	Action owner
Managers are trained on the conversation, not only the form				
Managers can write an observable objective				
Managers can give corrective feedback without escalation				
Managers understand the reward implications they control				
Managers receive their own performance conversation on time				

5. System measurement

Item	In place	Partial	Absent	Action owner
On-time completion is reported by department				
Rating distribution is compared with business results				
Employees can state their objectives unaided				
Underperformance cases addressed are counted				
Manager confidence in the system is sampled directly				

Scoring: count items marked Absent or Partial in each section. Any section with three or more gaps should be treated as a priority for structured review. Carnelian Consult | info@carnelianconsult.com | carnelianconsult.com