



Performance Review Discussion Plan Template

Features:

- Short, practical structure
- Reflects on goals, strengths, improvements, and new goals
- Space for both manager and employee perspectives

Template:

Performance Review Discussion Plan

Field	Details
Employee Name	
Reviewer/Manager	
Review Date	
Position/Department	
AI Note Taker Joined?	<input type="checkbox"/> Yes <input type="checkbox"/> No

1. Review of Previous Performance Goals

(List goals set for this cycle and brief notes on achievement.)

Goal	Manager's Assessment	Employee's Comments
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2. Strengths & Accomplishments

- What has the employee done particularly well?

3. Areas for Improvement

- What could the employee do better?

4. Employee Feedback/Concerns

- Employee shares their perspective, feedback, or concerns.

5. New Performance Goals (Next Cycle)

New Goal	Support Needed (Training, etc.)	Due Date/Review

6. Next Review Date & Agreed Next Steps

- 1)
- 2)
- 3)



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