

EMPLOYEE

My preparation

Complete this page for yourself before the conversation. Brief notes are enough.

My name and role

Meeting date / Review period

01 What went well for me

Describe one specific example: the situation, your contribution and the outcome.

02 What made my work harder

Which situation was difficult? What was missing and what was the effect?

03 What I would like from our collaboration

What should continue or change? Note an example and a specific request.

04 What I would like to learn next

Which task would you like to try? What support would you need?

My most important topic for the conversation

What happens in the conversation

Bring in the points you have chosen. After discussing them, record the outcomes on page 3 and agreed actions on page 4.

MANAGER

My preparation

Complete this page for yourself before the conversation. Use examples from across the review period and leave room for the other person's perspective.

My name / Conversation with

Meeting date / Review period

01 Which contributions I observed

Which task or goal was agreed? Which example illustrates the person's contribution?

02 What made the work harder

What changed? How did my decisions or a lack of support contribute?

03 What I want to discuss about collaboration

Separate observation from interpretation. What would you like to recognise, clarify or change?

04 Which development I can support

What learning opportunity can I offer? Ask about the other person's wishes too.

What I especially want to ask the other person

What happens in the conversation

Hear both perspectives first. Only record outcomes you have discussed on page 3. Different perspectives can remain different.

BOTH TOGETHER

Conversation record

Complete this page during the conversation. Summarise together what you discussed. Personal notes are not copied into the record automatically.

Employee and role / Manager

Meeting date / Review period

Purpose and jointly agreed focus

Review and working conditions

From 01 and 02: Which contributions, outcomes and obstacles did we discuss together?

Collaboration and different perspectives

From 03: What should continue or change? Whose views differ, and in what way?

Development goal

From 04: Which skill or task do we want to develop? In which work situation?

Still open

What remains unresolved? Who will clarify it, and by when? Do not present disagreement as consensus.

From an outcome to an agreement

Record the actions you agreed together on page 4. An observation on its own is not yet an action.

BOTH TOGETHER

What we agree

Choose a few achievable actions. For each one, name the person responsible, the support needed and a due date.

Conversation between / Date

Agreement 1

Next step Describe a specific action.

Owner Name one person.

Support What is needed and who will provide it?

Due date Enter a date.

Agreement 2

Next step Describe a specific action.

Owner Name one person.

Support What is needed and who will provide it?

Due date Enter a date.

Our follow-up conversation When will we discuss implementation? Record the date and meeting format.

How we will recognise progress Which specific outcome or work situation will we look at together?

Check together before finishing

- ☐ The actions and responsibilities are clear.
- ☐ Open questions and different perspectives are visible.
- ☐ We have agreed who receives the record and when we will revisit it.

Employee
Date and signature

Manager
Date and signature