

Template: Planning learning and development relating to performance reviews

As discussed in the [CIPD guide on effective performance management](#), appraisals should include the setting of new goals and objectives for the future, as well as broader conversations about development, progression and longer-term career plans.

Use this template to help plan learning and development relating to performance reviews and career goals. Try to plan short-term, medium-term and long-term goals.

Employee:

Job title:

Manager:

Review date:

Review period: from _____ to _____

Development goals and methods

Short-term development:

- to raise aspects of performance to acceptable level.

Development goals	Development methods (remember to include self-development, job assignments, coaching etc not just courses or formal learning)	Help needed from (remember it is your responsibility to arrange help and support)	Review methods, dates and comments

Performance management and appraisal tools

Medium-term development:

- to improve aspects of performance beyond 'meets job requirements' level
- satisfactorily undertake new tasks.

Development goals	Development methods (remember to include self-development, job assignments, coaching etc not just courses or formal learning)	Help needed from (remember it is your responsibility to arrange help and support)	Review methods, dates and comments

Longer-term development:

- to grow and develop employee within the organisation.

Development goals	Development methods	Help needed from	Review methods, dates and comments

Access practical guidance and links to more tools to support your performance management processes in the [CIPD's guide](#)