



PLANNING FORM

Employee: _____
Title: _____
Department: _____

PLANNING GUIDELINES:

The Planning stage provides the manager and the employee with an opportunity to review duties and responsibilities and agree upon goals and/or key areas of focus for the current performance cycle.

INSTRUCTIONS:

The Planning form should be completed by the manager or employee. List goals and/or key areas of focus along with any notes or additional comments. Insert a check-in date. Check-in meetings are recommended to occur every 90 days or as often as necessary. The Planning form should be reviewed, agreed upon and signed by the manager and employee during the Planning meeting. After completing the Planning meeting, the employee or manager should email the signed Planning form to PRIME@bernards.com.

List a goal or key area of focus for 2019:

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Insert notes or additional comments to support the goals or key areas of focus listed above:

Insert a Check-in date. Check-in meetings are recommended to occur every 90 days or as often as necessary.

EMPLOYEE NAME

SIGNATURE

DATE

MANAGER NAME

SIGNATURE

DATE