

EOS Core Process: Performance Management and Review

Process Owner: [Person from EOS Accountability Chart]

Last Updated: [Date]

Review Date: [Next quarterly review date]

EOS Integration

Connected EOS Tools:

Related EOS Rocks: [Current quarter Rocks that improve this process]

EOS Scorecard Metrics: [Weekly numbers tracked for this process]

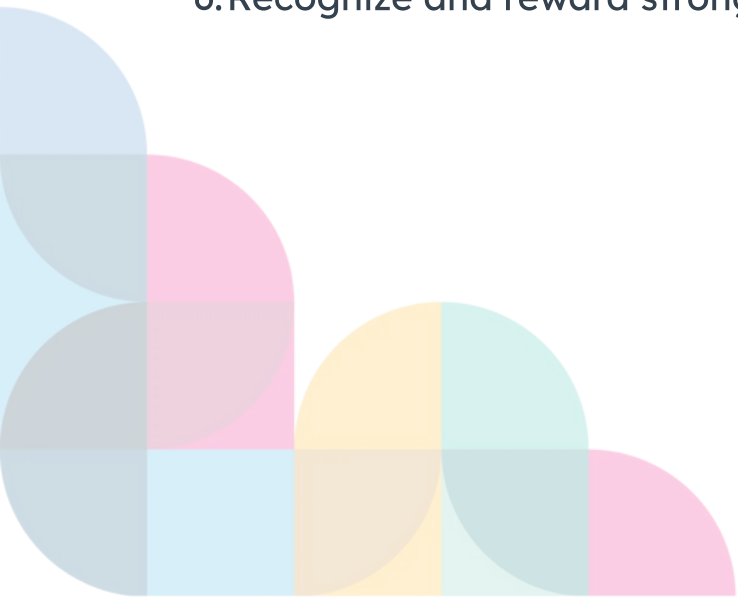
Accountability Chart Connection: [Which seat owns this process]

Process Overview

Purpose: Provide regular feedback, set clear expectations, and support employee development through structured performance conversations

High-Level Steps:

1. Set performance expectations and goals
2. Conduct ongoing performance conversations
3. Complete formal performance reviews
4. Create development plans and career discussions
5. Address performance issues when needed
6. Recognize and reward strong performance



Core Process Detailed Steps

Step 1: Set Performance Expectations and Goals

- Review job description and key responsibilities
- Set specific, measurable goals for review period
- Align individual goals with team and company objectives
- Establish success metrics and evaluation criteria
- Document expectations in performance planning system

Step 2: Conduct Ongoing Performance Conversations

- Schedule regular one-on-one meetings (weekly/bi-weekly)
- Provide timely feedback on projects and performance
- Address issues and obstacles as they arise
- Recognize achievements and progress toward goals
- Adjust goals and expectations as business needs change

Step 3: Complete Formal Performance Reviews

- Use standardized review template and process
- Evaluate performance against established goals and competencies
- Gather 360-degree feedback from colleagues and stakeholders
- Conduct comprehensive review meeting with employee
- Document performance ratings and improvement areas

Step 4: Create Development Plans and Career Discussions

- Identify strengths and areas for improvement
- Discuss career goals and advancement interests
- Create specific development action plans
- Identify training, mentoring, and growth opportunities
- Set timeline for development activities and next review

Step 5: Address Performance Issues When Needed

- Document performance concerns and specific examples
- Create performance improvement plan with clear expectations
- Provide additional support, training, or resources
- Monitor progress and provide regular feedback
- Take appropriate corrective action if improvement isn't sustained

Step 6: Recognize and Reward Strong Performance

- Provide meaningful recognition for achievements
- Consider compensation adjustments for strong performers
- Recommend high performers for advancement opportunities
- Share success stories and celebrate team wins
- Use recognition to reinforce company values and culture

Quality Standards & Success Metrics

Must-Have Standards:

- [] Standard 1 (measurable)
- [] Standard 2 (measurable)
- [] Standard 3 (measurable)

EOS Scorecard Metrics:

Weekly Metric 1: [Target number]

Weekly Metric 2: [Target number]

Monthly Metric: [Target number]

Accountability: Manager owns performance conversations and evaluation, HR owns process and documentation, Employee owns goal achievement

Frequency: Ongoing conversations, formal reviews annually or semi-annually

Success Metrics: Goal achievement rates, employee satisfaction scores, retention rates, internal promotion rates

Process Connections

Receives From: [Which EOS core process feeds into this one]

Hands Off To: [Which EOS core process this feeds into]

Dependencies: [Other processes or resources needed]



Tools & Resources

Required Systems/Tools:

Tool 1

Tool 2

Template/Document links

Training Materials:

Link to training video

Link to detailed SOPs (if needed)

Onboarding checklist

Troubleshooting & Common Issues

If [Problem], Then [Solution]:

Problem 1 → Solution 1

Problem 2 → Solution 2

Problem 3 → Solution 3

Escalation: [When to involve process owner or leadership team]



Process Improvement

Last Quarter's Improvements: [What was changed and why]

Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]

Issue 1

Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]

Leadership Team Review: [Date reviewed in Level 10 or quarterly]

Next Review Date: [Align with EOS quarterly cycle]



Quick Reference Card

[One-page summary of key steps for daily use]

The 5 Key Steps:

[Step 1 summary]

[Step 2 summary]

[Step 3 summary]

[Step 4 summary]

[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]

