4 a Professional Development Planning (PDP) Manager Checklist

The purpose of this checklist is to assist employees to prepare for and engage in performance and development conversations with their manager / team leader.

STEP 1 – Prepare for the PDP Conversations
- Role description
- PDP Template
- Strategic and Operational Plans
- Code of Conduct

STEP 2 – Explain the PDP Process, timeframes to all employees (See fact sheet 1)
NOTE: General explanations about the PDP process, the roles of the parties and the supporting documentation can take place in team meetings. This ensures that all employees hear the same messages, provides an opportunity to engage the team in discussion about the PDP process, and answer questions or address concerns that individuals may have.

STEP 3 – Reflect on the employee’s past and future performance.
- You can make notes in the PDP Template

STEP 4 – Arrange a date and time to have the PDP Conversation

STEP 5 - Have the Conversation – Remember no surprises here
This conversation sets the platform for the PDP process by enabling the manager / team leader and their employee to develop a shared understanding of the employee’s responsibilities, and associated performance and behavioural expectations, and their development needs. For managers / team leaders this involves leading and facilitating the PDP conversation. This will involve:

✓ Collaborating with the employee to develop SMART goals (specific, measurable, achievable, realistic and time-bound) related to performance planning and development activities

✓ Providing constructive and detailed feedback regarding employee strengths, achievements and areas for improvement (i.e. Be specific, use examples, discuss impact, jointly develop improvement strategies, and clarify what good performance looks like)

✓ Gauging the employee’s comprehension and buy-in by asking questions during and at the end of the discussion to check their perspective and understanding

✓ Reinforcing your commitment to the employee in supporting their on-going development

✓ Recording the key points of the discussion either during or immediately following the conversation (Note: Ask the employee to complete the PDP Template and send you the draft for checking prior to signing the final version)

✓ Agreeing a timeframe with the employee for completing and signing the PDP Template (Note: You will need to give the employee a signed copy of the completed template and place another copy on file)

✓ Agreeing a date for the 6 month review meeting

✓ Discussing and agreeing with the employee timeframes for on-going performance discussions (e.g. weekly or fortnightly meetings) and processes for raising concerns and providing ongoing feedback (e.g. how and when informal and ad-hoc feedback will be given).
PDP Manager Checklist

Top five tips for effective performance conversations

High performing teams have Performance and Development Plans in place for all team members, and have regular and effective conversations about these plans. Following these top five tips will help when having performance discussions, and provide a positive and engaging process for your employee(s).

Tip 1 Set clear expectations
One of the fundamental questions your employees will be wondering about is “What is expected of me?” This is particularly true when your employee is new to the team or when there has been a change to structure, process or strategy. Setting clear goals and measures of performance is essential for any employee to excel in their role and helps you to ensure that all members of the team are investing their energy into the activities that matter most. More importantly, these goals and expectations need to be communicated clearly to your employees. Don’t assume that they will know what your expectations are; clearly explain requirements, standards and timeframes, and repeat these messages often. Follow up employees’ understanding of the goals and challenge any assumptions.

Tip 2 Treat your employees as individuals
Understand your employee personally. No two people are the same and everyone will respond differently to different management approaches. Developing a detailed understanding of each employee’s strengths, areas for improvement, motivators and ambitions will help you to identify the most effective way of managing that person.

Tip 3 Provide regular feedback
Regular and timely feedback about performance and goals will assist employees to achieve their objectives. It also gives you an opportunity to identify obstacles in the way of the employee’s goal achievement and allows you to intervene early, making sure you get the outcomes you want. These conversations can take place formally or informally, depending on the employee and type of feedback. Managers and leaders who excel at managing performance do not wait until the six monthly review or annual performance and development planning conversation. A simple agenda can be used to provide clarity to your employee and allow them to prepare for the meeting. Keeping notes using the agenda as record of the discussion can also provide the basis for your next meeting. Following this process will ensure that there are no ‘surprises’ in the review or formal performance discussion.

Tip 4 Focus on the positive
To get the best from employees, maximise the use of praise and positive reinforcement to create an atmosphere conducive to high performance. Areas of concern should be addressed as soon as possible to prevent them from becoming a larger problem. Working in conjunction with the employee towards a mutually agreed solution will help you get “buy in”. Acknowledge the good work, achievements and wins of your employees. People want recognition and appreciation of their efforts.

Tip 5 Support and develop
Supporting employees to achieve their full potential is the role of a good manager. This support could come in the form of mentoring, coaching, training, specific “stretch” projects, e-learning, seminars or other development activities. Use the 70:20:10 model of learning to encourage and reward a continuous improvement approach.


For more information on how to get the best out of your PDP process, contact your local HR Business Partner, or Education Coordinator, Ann Whalley on 5433 8282 or ann.whalley@health.qld.gov.au