

Performance Review & One-to-One

SOP · UK · Updated 2026-07-11 · Square brackets are placeholders to replace with your own details.

A performance review and one-to-one procedure is the written routine for how managers and their people talk about work — the scheduled review that looks back over a period and sets objectives for the next one, and the regular one-to-one that keeps progress, workload, and problems visible in between.

Reviews without a procedure drift into two failure modes: the annual ambush, where feedback arrives months too late to act on, and the rubber stamp, where every form says "meets expectations" and means nothing. A consistent routine — prepared, evidenced, recorded — is also the paper trail that pay, promotion, and capability decisions stand on.

This template gives you a complete, ready-to-edit procedure: preparation steps, a meeting structure, objective setting, the one-to-one cadence between reviews, and the records that prove the cycle is real.

Purpose and scope

This procedure sets out how [Your company] runs performance reviews and one-to-ones. It applies to all employees who have completed probation; probation reviews follow the probation policy. Its purpose is that nobody is ever surprised by feedback and every objective has an owner and a date.

When to use this procedure

- Scheduled performance reviews: every [period, e.g. six or twelve months] for every employee.
- One-to-ones: every [frequency, e.g. two weeks] between manager and each direct report.
- Ad hoc reviews: after a significant role change, a return from long absence, or at either party's reasonable request.

Roles and responsibilities

- Line managers: schedule, prepare, run, and record reviews and one-to-ones for their team.
- Employees: complete the preparation form honestly and raise issues as they arise, not at review time.
- [HR/role]: owns the forms, tracks completion, and moderates consistency across teams.
- [Senior role]: reviews completion rates and sampling of records [frequency].

Before the review

1. Book the review at least [number] weeks ahead in a private space or uninterrupted call, and send the employee the preparation form.
2. Both manager and employee complete the preparation form before the meeting — self-assessment, progress against each objective, and topics to raise.
3. Manager gathers evidence: last review record, one-to-one notes, objective results, and any feedback from [sources, e.g. colleagues, customers].

4. Manager checks for anything that should have been raised earlier — a review must never be the first time the employee hears a concern.

Running the review

1. Open by confirming the purpose and the period under review.
2. Ask the employee to talk through their self-assessment first, before giving your own view.
3. Work through each objective against evidence — what was achieved, what got in the way, and what [Your company] could have done differently.
4. Agree a written summary of overall performance that both of you recognise as accurate. Record any disagreement in the employee's own words.
5. Set [number] objectives for the next period — each specific, measurable, and dated — and agree the support or development needed to hit them.
6. Close by agreeing the record, the development actions with owners and dates, and the date of the next one-to-one.

One-to-ones between reviews

- Held every [frequency] for [duration, e.g. 30 minutes]; rescheduled, never silently dropped.
- The employee's agenda comes first; the manager's updates come second.
- Standing items: progress on objectives, blockers, workload and wellbeing, development.
- Actions are logged with owners and dates in [system/shared note] and checked at the next session.
- Concerns raised in one-to-ones are addressed then, in the meeting where they surfaced — not saved for the review.

Records and proof of completion

Completed review forms, signed or acknowledged by both parties, are stored in [system] with a copy to the employee. One-to-one action logs are kept in [location]. [Role] tracks completion and chases overdue reviews monthly.

These records inform pay, promotion, and development decisions, so accuracy beats kindness: a record that overstates performance will be quoted back at you when it matters most.

If performance concerns arise

Persistent underperformance is handled first with an informal support conversation and a written improvement plan with clear measures and a review date of [period]. If performance does not recover, the matter moves to the [capability policy / formal procedure], which follows the ACAS Code of Practice. Nothing in this procedure delays action on misconduct, which goes straight to the disciplinary policy.

Review of this procedure

This procedure and its forms are reviewed [frequency, e.g. annually] by [name/role], using completion rates and feedback from managers and staff. Next review due: [date].

How to use this template

1. Pick a review cadence you will actually sustain — a six-month cycle that happens beats a quarterly one that slips.
2. Decide whether reviews carry ratings and whether they link to pay; if they do, add a moderation step across managers before outcomes are confirmed.
3. Edit the preparation form and standing one-to-one items to fit your work, then keep them identical across teams.
4. Train every manager on running the meeting — the procedure fails at the point where a manager reads the form aloud instead of having a conversation.
5. Calendar the whole year's cycle up front, including the completion-tracking checkpoints for [role].
6. Pilot the procedure with one team for a cycle and fix the form friction before rolling it out.

Official guidance

- › [ACAS — Code of Practice on disciplinary and grievance procedures](#)

This template is provided in good faith and for general information — it is not legal advice. Adapt it to your organisation and, where your sector carries specific legal requirements, have the finished document reviewed by a qualified adviser. The live version at <https://trainedteam.com/templates/performance-review-procedure> is kept current; this file is a snapshot.