



New Dynamics

Performance and goals

The continuous performance management playbook

A practical playbook for connecting goals, feedback, check-ins and development into a rhythm your managers can sustain.

Practical guidance · Worked examples · Printable worksheet

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Read in order for the full approach, or use the linked contents to find a section. The final worksheet gives you space to record decisions and next steps.

A practical playbook for connecting goals, feedback, check-ins and development into a rhythm your managers can sustain. This practical guide to continuous performance management brings together a step-by-step approach, illustrative examples, a reusable worksheet and answers to common questions. Start with the section closest to your current challenge, then use the working session to turn the guidance into a clear next action.

Start with a rhythm, not another form

Continuous performance management connects expectations, feedback, reflection and development throughout the year. It works when managers and employees use a repeatable rhythm that fits their work.

Start with one team and one useful conversation. Ask what the team needs to achieve, what currently gets in the way and how managers notice progress. Keep the initial process small enough to practise consistently.

Set clear expectations together

An employee should be able to explain the purpose of their role, their current priorities and what good work looks like. Goals provide direction; ongoing conversations keep that direction relevant.

- Agree a small set of meaningful priorities.
- Define an observable outcome for each priority.
- Record important dependencies and assumptions.
- Decide when a changed priority should trigger a goal review.

A goal is a working agreement, not a contract against every possible change. Use the [OKR guide](#) to make outcomes more concrete.

Make the check-in useful

Use a short recurring conversation to discuss progress, blockers and support. The right frequency depends on the role, the stage of a project and the employee's needs. Agree it together.

- What has changed since we last spoke?
- Which priority needs attention now?
- What feedback would be useful?
- Where can the manager remove a blocker?
- What will we each do before the next conversation?

Capture decisions and next steps. Do not try to transcribe the entire conversation. The [manager 1:1 template](#) gives the conversation a repeatable shape.

Connect feedback and recognition

Feedback helps people understand the effect of their work while they can still use the information. Recognition makes a valuable contribution visible. Both should describe a specific situation and explain why it mattered.

Ask contributors whether feedback can be carried into a later review and explain who will see it. Keep confidential support conversations out of general performance notes. Make it easy to correct an inaccurate account.

Use reviews as reflection points

A formal review becomes more useful when it reflects on evidence collected during the year. It can identify patterns across goals, contributions, challenges and development.

Review the full period rather than copying every note into one document. Agree what the evidence supports and what remains uncertain. Use the [performance review guide](#) to prepare a balanced conversation.

Pilot and improve the process

Choose a representative team, define a trial period and gather feedback from managers and employees. Check whether the process improves clarity and support before expanding it.

- Confirm ownership for each conversation and follow-up.
- Review whether notes are useful and proportionate.
- Ask what feels repetitive or difficult to complete.
- Adjust the cadence and questions.
- Document the changes before introducing the process to another team.

Software can connect the information and coordinate the process. It cannot replace the manager's responsibility to listen, explain and follow through.

Put the guide into practice

Set aside a working session with the people who own this process and one or two people who experience it. Use a fictional or appropriately authorised case, so the discussion can be specific without sharing unnecessary personal information. The purpose is to leave with a usable decision or document, not just agreement that the topic matters.

Prepare the case

Map the current rhythm for one team: goals, check-ins, feedback and formal reviews. Identify gaps where a changed priority or useful contribution disappears before the next conversation. Ask employees and managers which information they already keep and which forms duplicate it. Start with one recurring problem the team can improve.

Write the starting assumptions down before discussing solutions. If the group disagrees on what happened, identify the information needed to resolve that difference rather than building a plan on an untested story.

Work through the decision

Design a simple cycle that connects an expectation, a check-in and a follow-up action. Decide which notes are useful and who can see them. Keep the process light enough to sustain during busy periods. The aim is to make context available when people need it, not to record every interaction.

Ask each participant to explain the proposed decision in their own words. Differences in interpretation often reveal an unclear criterion, a missing responsibility or an instruction that will be difficult to follow.

Test an exception

Introduce a project change halfway through the cycle or feedback from a second manager. Decide how the employee's priorities and review context are updated. Check that continuous feedback does not become continuous surveillance or an unfiltered stream of comments that the employee has no opportunity to discuss.

Record what changes in this situation and what remains the same. An exception should lead to a clear next step, with an owner, rather than an informal workaround that nobody can explain later.

Agree the handoff

Agree a pilot period, a manager support plan and a feedback route for employees. Give the process owner a small set of outcome questions to review. Make the next formal review a reflection on the cycle's evidence and learning, rather than a separate exercise that ignores the intervening conversations.

Finish by confirming the owner, the next action and the date when the result will be reviewed. Give the person receiving the work enough context to continue without repeating the whole discussion.

Frequently asked questions

Does continuous performance management replace formal reviews?

It can change their role. Regular conversations keep expectations and support current, while a formal review can provide a structured reflection point. The organisation should decide which purposes each activity serves. Removing an annual form does not automatically create useful ongoing management, and adding monthly forms does not guarantee that conversations improve. Start with the employee experience and the decisions the process supports.

How can we avoid adding too much administration?

Capture only information that helps a decision, a conversation or a follow-up. Reuse relevant context where access and purpose allow, and retire duplicate forms. Ask managers and employees which records they actually consult. A small set of clear actions and changed expectations is often more useful than detailed transcripts or a large volume of disconnected updates.

What should we measure during a pilot?

Check whether people understand priorities, receive timely feedback and see support actions completed. Review whether managers can prepare a fairer, more informed conversation. Administrative effort and completion rates are useful supporting signals, but they do not establish quality alone. Include employee feedback and examples of changed decisions, then revise the process before expanding it.

Review the first cycle

Compare the pilot with the original problem. If useful context still disappears, examine the handoff between goals, notes and reviews. If people spend more time recording than discussing, simplify the information requirements. Keep the routines that help work and development, and document the changes before involving another team.

Keep a brief record of what was tried, what participants found useful and what needs to change. Compare the result with the original problem rather than judging success only by completion. If the process created extra work without improving clarity, quality or support, simplify it and test again. Share the agreed change with the people who will use it, and name the person responsible for keeping the guidance current.

About New Dynamics

[New Dynamics](#) connects goals, feedback, recognition and reviews around the way organisations work. This guide is published by the New Dynamics Editorial Team as part of our practical library for HR leaders, managers and People teams.

Use the examples and worksheets to structure your own discussions and adapt them to your organisation. Illustrative scenarios are not customer case studies. Policy and employment guidance needs appropriate local review before adoption.

For questions about this guide, corrections or a conversation about your performance management process, email contact@new-dynamics.com. Explore the complete [guide library](#) for related resources.

Your working worksheet

Use the prompts from this guide to prepare one real conversation or decision. Keep personal or sensitive information in your organisation's approved records. This page is for your own working notes.

Purpose: What needs to improve and for whom?

Evidence: What facts and context do you need?

Decision: What will you do and why?

Support: Who needs to be involved?

Next action: Who will do what and by when?

Review: What will show that the action helped?

Discuss your next step with New Dynamics: contact@new-dynamics.com