| Contract performance review meeting (template) |  |
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# Introduction

The contract performance review meeting template is a list of items that should be covered off during a contract and performance review meeting. These meetings can take place annually, bi-annually or quarterly depending on the complexity of the contract and the desired level of performance monitoring.

# Meeting details:

| Name | Title/Position |
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| ***Time / date of meeting:*** | XX:XX am/pm on DD/MM/YY |
| ***Nature of meeting:*** | [e.g. 6 monthly formal performance review] |
| ***Customer representatives:*** | [Name, position][Name, position] |
| ***Supplier representatives:*** | [Name, position][Name, position] |
| ***Location:*** | [insert location of meeting] |

# Agenda:

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| Duration (Typical) | Description | Responsible |
| 10 – 20 mins | Introduction /agenda | CO/CM |
| 10 – 20 mins | Status of action items | CA |
| 15 – 30 mins | Health, Safety and Environment | CM |
| 45 – 60 mins | KPIs and performance highlights | CM |
| 10 – 20 mins | Risks, issues and complaints (customer perspective) | CM |
| 10 – 20 mins | Risks, issues and complaints (supplier perspective) | Supplier |
| 10 mins | Benchmarking/best practices | Supplier/CM |
| 10 – 20 mins | Opportunities (technical/innovation) | Supplier |
| 10 – 20 mins | Performance improvement plans | CM/Supplier |
| 10 – 30 mins | Any other business  | CA |
| 15 mins | Wrap-up/action items | CA |

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| 1. **Contract details**
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| **Contract name/ID #**  | *Insert contract name or ID number* |
| **Supplier name** | *Insert supplier name* |
| **Contract summary** | *Brief description of the goods/services covered by the contract* |
| **Contract term**  | *Insert contract commencement and term of contract e.g. “3 years commencing on DD/MM/YY”* |
| **Contract status** | *Overview of current contract status including spend against contract, expiry dates, recent variations or extension, etc.* |

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| 1. **Status of action items**
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| *Outline of current actions required by customer or supplier related to the contract or the last performance meeting* |

| 1. **Deliverables, milestones and payment schedule**

*List all deliverables and milestones in relation to service delivery, including the relevant reporting (e.g. progress reports, activity reports etc) along with delivery and payment dates.* |
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| **Key tasks with deliverables/milestones** | **Delivery date** | **Status** | **Payment amount** | **Payment date** |
| *Key milestone* | *date* |  | *$[insert]* | *DD/MM/YY* |
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| 1. **Health, safety and environment**
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| Describe any issues and actions related to health, safety and environment |

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| 1. **Scorecard, service level and KPI review**
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| **Service level or KPI** | **Target** | **Rating** | **Comments** |
| *Insert KPI or service level* |  | *e.g. acceptable* | *Comments* |
|  |  | *not acceptable* |  |
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| 1. **Issues to be addressed**
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| *Identify any risks or outstanding issues to be addressed* |

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| 1. **Benchmark/best practices**
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| *Any benchmark and leading practices identified* |

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| 1. **Opportunities/performance improvement plans**
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| *Any opportunities identified for improvements/innovation on either customer or supplier side?**What is the performance improvement plan?* |

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| 1. **Other business**
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| *Include any key business updates or other information that should be noted during the performance review* |

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| 1. **Action items**
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| *List action items for next meeting* |
| ***Action*** | ***Person responsible*** |

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| 1. **Next meeting**
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| *Outline when the next performance meeting will take place* |