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Performance Review Template

Section	Description	Rating
Goals	Employee	Employees and supervisors set clear, measurable goals for the upcoming review period. These goals should align with the company's overall objectives and include milestones for tracking progress.
	Manager	Exceeds Meets Needs Improvement
Policies Adherence	Employee	Assess how well the employee follows company policies, procedures, and expectations. Provide ratings and examples of compliance and areas for improvement.
	Manager	Manager Rating
Training & Development	Employee	Evaluate the employee's participation in training sessions and development activities. Assess how they apply newly gained skills to their job responsibilities.
	Manager	
Company Culture	Employee	Review the employee's contribution to promoting a positive company culture. Consider collaboration, attitude, teamwork, and their influence on the work environment.
	Manager	
Readiness for Change	Employee	Assess the employee's adaptability and readiness for change. Evaluate how well they embrace new initiatives and contribute to the implementation of changes.
	Manager	
Job Duties	Employee	Rate the employee's performance on their core job duties. Provide a rating scale (e.g., Exceeds Expectations, Meets Expectations, Needs Improvement) along with examples of work quality.
	Manager	



Section	Description	Rating
Feedback	Provide specific, constructive feedback on the employee's performance. Include both strengths and areas for improvement. Focus on actionable items to support their development.	
Rewards & Recognition	Acknowledge specific accomplishments and contributions of the employee. Highlight achievements and recognize efforts that align with company values.	

Rating Scale Examples:

- **Exceeds Expectations:** Consistently goes above and beyond in all aspects of the job.
- **Meets Expectations:** Successfully fulfills job requirements and responsibilities.
- **Needs Improvement:** Needs support to improve in specific areas of performance.

Additional Guidance:

- **Goal Setting:** Ensure that goals set during the review are specific, measurable, achievable, relevant, and time-bound (SMART).
- **Development Focus:** Discuss potential areas for the employee's growth and suggest relevant training or upskilling opportunities.
- **Open Discussion:** Encourage open communication during the review, allowing employees to express their perspectives, share challenges, and discuss career aspirations.

Instructions for Completing the Performance Review Template:

1. **Schedule a Review Meeting:** Set a time that works for both the employee and the manager to ensure there are no interruptions.
2. **Prepare in Advance:** Both the employee and the manager should prepare ahead of time by reviewing past performance, goals, and accomplishments.
3. **Fill Out Employee Rating:** The employee should complete the **Employee Rating** section for each category before the meeting.
4. **Manager Review:** The manager should complete the **Manager Rating** section after reviewing the employee's self-assessment.



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5. **Discuss Each Section:** During the review meeting, go through each section, allowing both parties to provide input and examples.
6. **Set New Goals:** Work together to define new goals for the next review period, ensuring they align with company objectives.
7. **Provide Feedback and Recognition:** Use the **Feedback** and **Rewards & Recognition** sections to discuss strengths, areas of improvement, and recognize achievements.
8. **Document Action Items:** Ensure that any agreed-upon actions or follow-ups are clearly documented for accountability.
9. **Finalize the Review:** Once all sections are discussed, both the employee and the manager should sign off on the review to acknowledge mutual understanding.