



PERFORMANCE REVIEW TEMPLATES

INTRODUCTION

Performance reviews are two-way, individualized conversations—typically between a manager and an employee about impact, development, and growth.

Having effective conversations means asking (and inviting) the right questions. Best practices templates can help you focus on the topics that are important to employee, team, and business success.

These performance review templates will help you invite honest, genuine feedback and uncover actionable ways to improve performance.

Inside you'll find performance review templates for:

- Peer, upward, and 360 reviews
- Behavior change and performance improvement
- Goal setting and progress checks
- Compensation and professional development

G.O.O.D. PERFORMANCE REVIEW

PURPOSE

Use this template to help guide an effective one-on-one conversation.

Goals:

- What long-term goals have we agreed to?
- How have things gone since we last spoke?
- What are our plans until next time?

Obstacles:

- What's standing in your way?
- What have I noticed getting in your way?
- What can I do to help? What can you do?

Opportunities:

- What are you proud of that people don't know about?
- Do you feel you're growing toward where you want to be?
- What could we do to make this your dream job?

Decisions:

- What actions will you take before next time?
- What actions will I take before next time?
- What others big decisions did we make?

G.O.O.D. Feedback is:

Specific

Can you give me an example?

Frequent

Wish I'd known this sooner.

Outcome-Focused

Why does this matter?

Positive

What am I doing well?

Conversational

When do I get to talk?

QUARTERLY PERFORMANCE CHECK-IN

PURPOSE

Use this template to layout the topics of discussion for quarterly performance conversations.

Reflect on the past:

- What were the highlights of your past month/quarter?
- What did not go well last month/quarter?
- What are your goals for the upcoming month/quarter?

Make a plan:

- What would make the next 60-90 days successful for you at work?
- What kind of support do you need to achieve your goals?
- How will you measure or track your progress on these goals?
- What steps will you take to attain these goals?

Look to the future:

- What are your goals for next quarter?
- Do you understand how your personal goals align with team goals?

Good:

Managers reflect on past performance, provide suggestions, and end with a summary of the meeting.

Best:

Employees and managers review performance, collaboratively discuss action plans, and look to the future.

MID-YEAR PERFORMANCE REVIEW

PURPOSE

Use this template to layout the topics of discussion for mid-year performance conversations.

Reflect on the past:

- What were the highlights of your year so far?
- What did not go well in the last 6 months?
- How have things gone since we last spoke?

Make a plan:

- What would make the next 180 days successful for you?
- What kind of support do you need to achieve your goals?
- How will you measure or track your progress on these goals?
- What steps will you take to attain these goals?

Look to the future:

- What are your goals for the rest of this year?
- What can you do to positively impact your performance in the next 6 months?
- What can you do to positively impact your performance toward your ideal role?
- Do you understand how your personal goals align with team goals?

Good:

Managers reflect on past performance, provide suggestions, and end with a summary of the meeting.

Best:

Employees and managers review performance, collaboratively discuss action plans, and look to the future.

ANNUAL PERFORMANCE REVIEW

PURPOSE

Use this template as a guide for discussing performance over the past year. Find out what personal and professional goals employees would like to prioritize and build out a plan for the future.

Reflect on the past:

- What were the highlights of your year?
- What did not go well this year?

Make a plan:

- What personal goals should we set for this year?
- What professional goals should we set for this year?
- What kind of support do you need to achieve your goals?
- How will you measure or track your progress on these goals?
- What steps will you take to attain these goals?

Look to the future:

- What performance impact(s) can I make moving forward?
- How do you see your personal goals aligning with team goals and the organization's mission?

Good:

Managers reflect on past performance, provide suggestions, and end with a summary of the meeting.

Best:

Employees and managers review performance, collaboratively discuss action plans, and look to the future.

SELF-ASSESSMENT

PURPOSE

Use this template to help employees understand their performance and discover barriers to, or opportunities for, success and growth.

Questions to ask:

- In what ways can you improve your performance?
- What actions are needed to support the improvement?
- What barriers or hurdles exist to improving your performance?
- What metrics/milestones can we use to make sure you're on track?
- How will you hold yourself accountable for achieving goals and results?

Examples of good performance:

- 1.
- 2.
- 3.

Examples of poor performance:

- 1.
- 2.
- 3.

Feedback from others:

- 1.
- 2.
- 3.

PEER REVIEW

PURPOSE

Use this template to provide employees with an opportunity to give and receive constructive peer-to-peer feedback.

Project execution:

- How are your projects or tasks going?
- How are you prioritizing your projects or tasks?
- How will you ensure your projects and tasks are completed on time?

Role fit and strengths:

- What ideas do you have about how we can match your talent to responsibilities?
- What qualities do you look for in a mentor?
- Is there anyone in our organization you'd like as a mentor?

Team and collaboration:

- How can you increase trust with your coworkers?
- What do you expect from your coworkers?
- How can your coworkers count on you?

UPWARD FEEDBACK

PURPOSE

Use this template to help managers and leaders recognize how they impact their team.

Level set on support needed:

- What can [manager] do to help you be more engaged?
- How is [manager] setting you up for success?
- [Manager] brings focus to important, tasks, ideas, or messages.
- How does [manager] ensure employees are in the right role?

Ask for feedback:

- What are some things I do well as your manager?
- What is one area that I can improve as your manager?

Good:

Managers ask for feedback and employees share anonymously or through surveys.

Best:

Managers and employees discuss opportunities for growth and collaborate to work better as a team.

TEAM PERFORMANCE REVIEW

PURPOSE

Use this template to build trust by creating an open feedback culture among teams.

Reflect on the past:

- Any individual and/or team highlights worth sharing?
- Any individual and/or team lows worth sharing?
- Review team goals and objectives.
(monthly, quarterly, annually)
- Review company goals and objectives.
(monthly, quarterly, annually)
- Review company mission, vision, and purpose.
- Celebrate wins and successes.

Make a plan:

- What individual goals could you set that would help assist overall team or company goals?

Look to the future:

- How can you contribute to other projects or tasks for which our team is responsible?

Good:

Employees voice opinions privately or with HR and managers react accordingly.

Best:

Teams discuss openly, sharing roadblocks and hardships they experience, and the group creates a joint solution.

360 PERFORMANCE REVIEW

PURPOSE

Use this sample template to gather feedback from the people that your employees work with every day for a diverse set of data.

Note: A 360 typically looks at several core concepts such as those related to performance, accountability, trust and respect, upholding company values, and more. This is example content to get you started.

Good:

Employees receive feedback from coworkers on their team and their manager.

Best:

Employees give and receive feedback to employees across teams, departments, and levels.

Performance

Self: On a scale of 1-5, rate your ability to hold others accountable.

Peer: On a scale of 1-5, rate [employee's] ability to meet the goals he/she set.

Open-ended: Tell me about a time when [employee] held others accountable for desired results.

Accountability

Self: On a scale of 1-5, rate your ability to bring energy to the workplace.

Peer: On a scale of 1-5, rate the level of energy that [employee] brings to the workplace.

Open-ended: Is [employee] more likely to use intrinsic or extrinsic motivations?

PROFESSIONAL DEVELOPMENT

PURPOSE

Use this template to understand how an employee's skills and strengths align with their role. Then discuss their goals and what steps they will need to take to reach their goals.

Address alignment:

- Which of your strengths are underutilized in your current role?
- What are your current career priorities and goals that most excite you?
- How do you think this job aligns with your personal values?

Discuss development:

- What barriers or hurdles exist to achieving your professional goals?
- Are there any learning opportunities that you would like to participate in?
- What can you start/stop/keep doing to help you reach your professional goals?

Talk through training and goals:

- What new or improved skills would help you be more effective in your role?
- What new or improved skills would help you be more efficient in your role?
- What skills are needed to reach your long- and short-term goals?

Good:

Goals are primarily focused on professional growth within the year.

Best:

Goals are focused on personal and professional growth over the next 3-5 years.

PERFORMANCE IMPROVEMENT

PURPOSE

Use this template to discover what's hindering top performance and create a plan to improve it.

Address accountability:

- How did you perform on your goals?
- What resources would have been helpful in achieving your goals?
- How can I help keep you accountable for achieving goals and results?
- How will you keep yourself accountable for meeting goals, deadlines, and results?
- How are you being efficient or inefficient with your time?

Make a plan:

- Include specific objectives and key results that will lead to reaching your goal(s).
Make sure to include due dates for each OKR or SMART goal to keep on track.
- Discuss goal progress with your manager or a mentor.
If you encounter a barrier to achieving your goal, ask for help in removing or working around the barrier.

Reflect:

- What is a recent situation you wish you had handled differently?
- What would you have changed?
- What are other situations you can use these strengths?

Good:

Managers reflect on performance and provide feedback to improve.

Best:

Managers and employees discuss opportunities for growth and coach to be successful together.

BEHAVIOR CHANGE

PURPOSE

Use this template to find out what behaviors are enhancing or detracting from performance.

Questions to ask:

- What behaviors do you bring to your work and to the team that have a positive impact?
- What skills or behaviors would you like to improve or refine?
- What steps can you take in order to improve or refine these behaviors?

Good:

Managers address past issues and provide feedback for how to improve.

Best:

Managers and employees discuss past issues, identify needs, attempt to remove barriers, and create a joint plan to improve.

90-DAY REVIEW

PURPOSE

Use this template to review an employee's first 90 days at your company. Align on employee role, resources, and goals.

Role clarity:

- What are your favorite and least favorite parts of this job?
- Are the responsibilities of your role what you expected? Why/why not?
- What excites you the most about your day-to-day responsibilities?

Training, tools, and resources:

- Do you have the resources and tools you need to perform your job?
- What resources and tools could help you perform your job better?
- Do you have all the information needed to do your job effectively?

Goal setting and alignment:

- Are there any goals that will be challenging for you to accomplish this month/quarter?
- Do you understand how your personal goals align with team goals?
- What do you think will be the keys to your success over the next (6, 9, 12) months?

COMPENSATION CHECK-IN

PURPOSE

Use this template to track an employee's understanding of compensation, benefits, bonuses, and pay.

Check in:

- What questions do you have about how you are paid?
- What questions do you have about our benefits package? (*Health, wellness, 401(k), etc.*)

Follow up:

- What compensation goals do you have for yourself in the next five or ten years?
- What questions do you have about the benefits you are currently receiving?
- How could the organization help you better utilize our benefits?
- What other benefits would you add to our benefits package?

Good:

Managers share a compensation policy and offer HR as a resource.

Best:

Managers and employees discuss the compensation together, answer questions, and keep an open door for regular conversations.

GOAL SETTING CONVERSATION

PURPOSE

Use this template to discuss development of an employee's monthly, quarterly, or annual goals.

Reflect on the past:

- Share some highlights from last month/quarter/year.
- What accomplishment are you most proud of so far?
- What other projects or tasks would you like to work on?

Make a plan:

- What are your goals for the upcoming month/quarter/year?
- What inspired these goals?
- What can you start/stop/keep doing to reach your goals?

Address alignment:

- Do you feel your short- or long-term goals are attainable and realistic?
- Who here do you lean on to help set short- or long-term goals?
- How can you contribute to other projects or tasks for which our team is responsible?

Good:

Managers determine and share goals for employees to meet in the upcoming year.

Best:

Managers and employees discuss goal opportunities together and create a plan to achieve them as a unit.

SIMPLE 1-ON-1 PROGRESS CHECK

PURPOSE

Use this template to facilitate a discussion on performance on goal progress.

Before:

- What's top of mind for you since our last check-in?
- How's the project/task/goal going?
- Do you have any existing or anticipated roadblocks or challenges we should discuss?

During:

This section is a list of suggested follow-up prompts to guide what comes up during the check-in.

- | | |
|--------------|--|
| 1. Update | Is this still in alignment with you meeting your goals/objectives? |
| 2. Learned | How did you apply what you learned? |
| 3. Roadblock | Do you have (or need help with) ideas to accomplish your work? |
| 4. Ideas | Have you tried [fill in the blank]? |

After:

- What went well?
- Anything you would change for next time (or the future)?
- Discuss other similar or new projects/tasks to work on next.

Effective performance conversations are an essential part of your performance management strategy. Your performance management software should help you get there. Find a tool to help do the heavy lifting.

DRIVE EMPLOYEE PERFORMANCE WITH THE RIGHT EMPLOYEE SUCCESS TOOLS.

Our software helps you:

- Make regular performance conversations more effective
- Build a shared agenda for collaboration and transparency
- Easily converse and take notes within the 1-on-1 meeting
- Pull in important data like goal progress and feedback
- Leverage custom templates to fit your culture and team

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