Performance review template

NB: *This performance review template is provided as a sample framework only. All sections, rating scales, and example language are illustrative and must be tailored to reflect your organization's specific policies, culture, and legal requirements. Before use, replace all placeholder text with information relevant to your company, confirm alignment with current employment laws and HR practices, and obtain any necessary approvals from your HR or legal team. This document is not intended as legal advice and should be customized to meet the unique needs of your workforce.*

Employee information

Name: _____

Job title: _____

Department: _____

Reviewer: _____

Review period: _____

Performance summary

Provide a brief overview of the employee's key achievements and contributions during the review period. E.g., summarize major accomplishments, notable projects, and overall performance highlights.

Also, tie achievements to measurable outcomes (e.g., impact on team metrics, business goals, organizational strategy).

Prompt for employee (self-reflection):

- *What are you most proud of during this period?*
- *Where do you feel you had the biggest impact (on the team, customers, business)?*

Prompt for manager:

- *Which achievements or contributions stood out?*
- *What impact did these achievements have?*

Key competencies

Rate each on a defined scale (e.g., 1–5 = Unsatisfactory to Exceptional) and include specific examples.

Competency	Rating	Comments
Role core knowledge		
Quality and accuracy of work		
Productivity and reliability		
Communication and teamwork		
Initiative and problem-solving		
Adaptability and learning		
Leadership (if applicable)		

Note: *These are the most commonly used competency categories. They should be aligned to your business values and working style (e.g., some companies might choose 'Data-driven decision-making' or 'Collaboration across functions' to make work better within their own environment).*

Goals review

Previous goals

- Goal 1: [Progress/Outcome]
- Goal 2: [Progress/Outcome]
- Goal 3: [Progress/Outcome]

Comments:

Highlight successes, challenges, and lessons learned.

Strengths and key contributions

List key strengths, unique skills, or achievements that positively impacted the team or organization.

Areas for development

Identify specific skills, behaviors, or competencies for improvement. E.g., describe opportunities for growth and recommended training.

Guide for managers:

- *Where does this person have room to grow?*
- *Which skills, mindsets, or experiences would unlock the next level of impact?*
- *What organizational blockers (tools, processes, priorities) slowed them down?*

Goals for next review period

Set SMART goals:

- **Specific**: what exactly will be accomplished and why is it important?
- **Measurable**: how will success be quantified?
- **Achievable**: is it realistic with current resources?

- **Relevant**: how does it align with team/company objectives?
- **Time-bound**: what is the deadline or milestone date?

Goal	Specific	Measurable	Achievable	Relevant	Time-bound
Example: **"Improve client response time"**	Reduce average customer email response time by 20%	Track average reply time weekly using CRM reports	Assign one dedicated rep per shift and implement email triage	Supports company goal of improving customer satisfaction scores	Achieve 20% reduction by Q3 end

Overall rating

Choose a consistent company scale. E.g. Outstanding, Exceeds Expectations, Meets Expectations, Needs Improvement.

You can also align to the same scoring scale you use for all your people metrics (0-4 or 0-5).

Signatures and acknowledgement

Employee: _____ Date: _____

Reviewer: _____ Date: _____

HR rep: _____ Date: _____

"My signature confirms that I have reviewed this evaluation and had the opportunity to discuss it with my manager. It does not necessarily indicate agreement with the assessment."

Confidentiality statement

This document is confidential and intended for internal HR use only. It must be stored according to company policy and applicable federal or state record-retention requirements.

Practical tips for HR professionals

- Document all examples and ratings thoroughly to support decisions on pay, promotions, or corrective actions.
- Be consistent across employees to mitigate discrimination claims.
- Provide employees with a copy of their signed review.
- Use clear, specific language to avoid ambiguity.
- Balance strengths and development areas to maintain motivation and fairness.
- Encourage two-way dialogue: the review should be a conversation, not just an evaluation.
- Document agreements and next steps for follow-up.
- Of course, also make sure to listen actively, ask open questions, and prepare examples, as a performance review is more than just ticking a box.