## [Insert Logo Here]

## **Performance Reviews (Template)**

### Self Evaluation

1. How have you been feeling over the past x months?
2. In the past x months, what accomplishments are you most proud of?
3. What goals did you meet?
4. What goals did you fall short of meeting?
5. Please give yourself a rating on the following scale:

5 - Exceeds expectations, most of the time. I achieved truly amazing results. I regularly make significant contributions to the team or our clients with minimal or no error.

4 - Exceeds expectations, some of the time. I’m working well above what is expected of me in my role and errors are rare and seldom repeated.

3 - Consistently meets expectations, all of the time. I’m doing a good job, occasionally exceeding expectations, with occasional room for improvement.

2 - Fails to meet expectations, some of the time. I’m struggling to meet what is expected of me. My work is inconsistent. Sometimes I meet expectations but there's often room for improvement.

1 - Fails to meet expectations, most of the time. I’m not meeting expectations. I’m missing the knowledge or ability to perform.

1. What makes you the best-fit for your role? (Think: hard-skills, soft skills)
2. What do you think you need to improve upon? (Think: hard skills, soft skills)
3. What skills do you have that you believe we could use more effectively?
4. What do you want your next position here to be? How would your responsibilities change?
5. What keeps you motivated to get your job done?
6. What do you like the most about working here? The least?
7. What can your Manager do differently to make your role more enjoyable?
8. What can the team do differently to help you work better together?
9. Anything else on your mind that you would like to share at this time?

### Manager’s Evaluation

1. What goals did the team member meet?
2. What goals did the team member fall short of meeting?
3. Please give the team member a rating on the following scale?

5 - Exceeds expectations, most of the time. They achieved truly amazing results. They regularly make significant contributions to the team or our clients with minimal or no error.

4 - Exceeds expectations, some of the time. They’re working well above what is expected of them in their role and errors are rare and seldom repeated.

3 - Consistently meets expectations, all of the time. They’re doing a good job, occasionally exceeding expectations, with occasional room for improvement.

2 - Fails to meet expectations, some of the time. They’re struggling to meet what is expected of them. Their work is inconsistent. Sometimes they meet expectations but there's often room for improvement.

1 - Fails to meet expectations, most of the time. They’re not meeting expectations. They are missing the knowledge or ability to perform.

1. What does the team member do well? (Think: hard skills, soft skills)
2. What does the team member need to improve upon? (Think: hard skills, soft skills)
3. What is your team member's next role here? (Think: future state)
4. Are there any other comments you would like to add about the team member at this time?

### Peer Evaluation

1. How often does this person succeed at the following? (1-5 Likert scale)
   * Delivers high quality work
   * Shows detail and accuracy in their work
   * Develops, organizes and manages tasks effectively
   * Completes tasks on time
   * Problem solves and prioritizes tasks effectively
2. What are this person's biggest strengths?
3. What are some areas in which this person can further improve?
4. How well does this person collaborate with others?