

Annual performance review template

Performance review time is often something that both employees and managers dread. Reviews can be awkward, contentious, or often just feel like a waste of time. Sometimes, that's true. However, performance reviews can also be incredibly valuable tools. They create opportunities for employees to get feedback on their job performance, what's working well, and what needs improvement. They even give employees a chance to give provide their own feedback.

However, performance reviews are not as valuable of an organizational tool if they're done differently year after year, or even in the same year between different managers. Consistency is key to an effective performance review — it's how you compare employee performance and measure improvement. That's why it's vital that you use a consistent format, process, and performance review template. A template ensures that each manager reviews each employee in the same way year after year.

So what should be included in a performance review template? Let's take a look.

Types of annual performance review templates

There are many performance review templates available based on what you're looking to get out of them. Depending on your workplace culture, different approaches may work better for your team. Or you may find that a combination of approaches works best.

Here are a few of the most common options.

General performance review template

This performance review template is used to assess an employee's overall performance. You'll find they have a combination of a quantitative scale and qualitative questions to provide additional context regarding the qualitative data.

Usually, this mixed structure works well for employers, as it includes easily comparable numbers. However, it also leaves room for you to expand upon different points and add nuance.

Narrative structure performance review template

The narrative structure is similar to the general performance review template in that there are qualitative questions. However, you only rate employees using long-form answers. There's no quantitative scale included.

For larger organizations, this may not work well on its own. Many companies use performance reviews to determine raises, promotions, and such. In that case, you'll want some hard numbers to easily compare employees.

Quantitative scale performance review template

This performance review template only has quantitative questions, so there are no open-ended questions. You

have limits in communicating information since you can't expand upon any of your questions. A benefit is that it's typically faster to complete and easier to cover many performance areas at once.

This may work well on the back end in an employee management system. However, when meeting with employees, be sure to give additional information. In order for them to improve, they'll need more insight from you than just a 3/5 on a review.

Self-assessment performance review template

The self-appraisal performance review allows employees to rate their own performance. This is useful because you can understand how they think they're doing and compare that to how you view their performance. Holding reviews in this way allows for a more comprehensive understanding of employee performance instead of solely being a one-sided experience.

Often, companies will have an employee perform a self-evaluation while their supervisor reviews them independently. The two will then meet and discuss the differences between their reviews. This can provide valuable insight and give employees a structured opportunity for input.

360 performance review

A 360 performance review has not only the supervisor review an employee, but also their coworkers. Coworkers that interact with the employee frequently will provide input on their interactions, how timely the employee is, the quality of the work, etc... This gives additional insight that a supervisor might not see on a day-to-day basis and creates a more complete picture of the employee's performance.

The downside, however, is that such a review is much more labor-intensive than the normal process. You'll often want several employees to provide input. Thus, this is not always a pragmatic approach to use for each employee, and often is reserved for key performers, or employees who may be upcoming leaders.

30-60-90 performance review template

A 30-60-90 performance review is most often used for new employees, assessing their performance at key points during onboarding. It will typically assess how well a new employee is adjusting, learning their job responsibilities, etc... This is not often used after the new hire onboarding process. However, it could be valuable if an employee is on a performance improvement plan or is adjusting to a new promotion.



How to prepare to complete a performance review

Having a performance review template will help you be more organized and strategic in your performance evaluation process, but that's not the only thing you need to prepare.

You should complete some additional things before starting the performance review process to allow for the best results.

- Gather all relevant performance review criteria, employee goals, and prior goal progress information.
- Gather all relevant employee data and examples related to performance.
- Create an agenda for the meeting and prepare notes.
- Schedule the performance review meeting.
- Set expectations for the meeting.

Performance review template components

In our sample performance review template, we've included the following sections. However, it's important to note that no performance review form is going to match an organization's needs perfectly. As such, it's important to adapt templates to suit your own needs. We've worked in some places where you can add your own traits and skills to assess. In addition, each section here can be removed or added to easily. If you track employee goals elsewhere, then feel free to remove those sections from this template.

Employee information

While this may seem obvious, it's important to make sure all key identifying information is included in the performance review. For a small business, just the employee's name might be adequate. However, in larger organizations, you may wish to add the employee's ID, office location, and other information to help with organization and identification.

Likewise, include appropriate information on the reviewer. Sometimes an employee's supervisor might change during their employment. When looking back at old performance review records, it's helpful to know who performed the review. This data can also be useful when comparing performance reviews across the organization. For example, Human Resources may notice that a particular manager tends to review their staff more critically than another manager.

Core traits

In this section, you'll assess an employee's most important traits and qualities. These include things like work quality, communication skills, decision-making, and more. In addition to including some general recommendations for traits to assess, we also left space for you to add a few of your own. These may be done organizationally, across the department, or perhaps vary based on the skills needed for an individual position.

Regardless of what you choose, these traits should not vary greatly from year to year, or across different sections of the organization. Performance reviews are tools for measuring performance over time, growth, and improvement. As such, it's important to ensure that the goals and benchmarks stay fairly consistent.

We've chosen a rating scale of 1 to 5 for simplicity. However, you may opt for a different scale that removes numbers altogether, or use a more simplified ranking system like evaluating employees on a scale of 1 to 3.

Performance goal assessment

Many employers like to set goals for employees throughout the year. These may include things like taking on new types of projects, taking a leadership role in a particular group, advancing certain skills, and more. Whether

you're assessing an employee mid-year or doing an annual evaluation, it's important to check back on these goals. Is the employee making progress? Did they complete the goal? Did something change throughout the year and the original goal is no longer relevant?

Be sure to spend some time determining if the goals have been achieved satisfactorily, and if not, what factors contributed to that. If the original goal was unrealistic, or couldn't be completed, then it shouldn't be held against the employee, so be sure to note that in the comments.

New performance goals

Here you can set new goals for the upcoming period, or make adjustments to existing goals as things change during the year. Be sure to set measurable targets and benchmarks throughout the year that will monitor an employee's growth and development. A goal shouldn't be set in January and then not looked at again until December. Instead, it should be followed and reviewed over the course of the year.

Overall employee rating

Not everyone might feel comfortable boiling down an employee's full year of work to a one-digit number. However, in large organizations, simple points of comparison are often needed for comparing employees. Thus, it may be necessary to do so. Be sure to determine if your organization will only use whole numbers like 3 and 4, or if it's ok to get an employee a 3.5.

While you may decide to simply add up and average all an employee's ratings from the traits assessment to come up with a number, don't forget to factor in their movement on their goals. Additionally, if new projects came up during the year and the employee stepped up, be sure to include that as well and provide comments. For example, if you originally planned to give an employee a 3, but they took on a new project mid-year and did a stellar job but it was outside the scope of their original goals, you might consider giving them a 4 instead. Just be sure to include your reasoning in the comments section.

Employee comments

Performance reviews are not always pleasant experiences for all parties involved. After all, employees who need improvement may be upset about the results and disagree with the reviewer. As such, it can be a good idea to leave space for an employee to provide feedback on the review. It's important not to let this section become a 2-page rant about the employee's dissatisfaction with the company. It should be kept simple and direct, focusing just on the points being assessed in the review.

A dissatisfied employee may take issue with signing a review they disagree with, but is probably more likely to accept it if they have a chance to voice their disagreement.

Acknowledgments

Don't forget this important step. Performance reviews are an assessment, but they're also an organizational tool and sometimes a legal document. It's vital that both the employee and the reviewer acknowledge that the review took place. Signing this section doesn't mean the employee completely agrees with the assessment, just that they acknowledge it took place and was received.

Annual performance review template

Now that we've taken a look at the key sections, go ahead and download our [annual performance review template](#) and take a stab at customizing it to fit your needs.

Sample employee performance review template interview questions

While the base performance review template focuses on assessing performance in a more quantitative way, a performance review is also a chance to get a qualitative feeling for how an employee is doing. As such, it's important to ask an employee questions to determine how they feel about their work, the job, what challenges they face, and more.

Below are some examples of questions to ask during a performance review. You may opt to add these to the review document and record the answers, or you may simply use them as guidance in steering a conversation.

Previous performance

- What accomplishments are you most proud of?
- What goals did you meet?
- What goals did you fall short of?
- What specific contributions have you made to the team?
- How well do you think your team accomplished its goals this year?

Current job role

- What do you like least about your current role? How would you change it?
- What do you like most about your current role?

Employee strengths & performance improvement areas

- What personal strengths help you do your job well?
- What makes you the best fit for the position?
- What work tasks come easiest to you?
- What can I do better to help you reach your goals?
- What things will you focus on in the next quarter to help you grow?
- Are these concerns a fair assessment of your performance?

Problem-solving

- Do you have any ideas to improve the current issues?
- Do you believe the outlined solutions will improve your job performance?

Future performance

- What type of career growth is most important to you?
- What are your most important goals for the next quarter?
- What professional growth opportunities would you like to explore?
- Do you feel you can realistically meet your goals?
- How optimistic are you about your team for the upcoming year?

Manager-employee relationship

- What can we do to improve our relationship?
- How do you prefer to receive feedback/recognition for your work?
- Do you feel supported as a whole by your manager and the company?

Additional questions

- Are there any additional noteworthy accomplishments to consider?
- What actions were taken to improve performance from the previous review?
- What are the professional development goals?
- What areas require improvement in job performance?



Performance review quantitative questions

You can incorporate the following questions in your performance review and provide input based on a quantitative scale, such as a rating from 1-5. These questions might include follow-up narrative responses or stand-alone, depending on the type of performance review template you utilize.

- How productive is the employee?
- What's the quality of their work in terms of errors, mistakes, and accuracy?
- How consistently does the employee show up to work and arrive on time?
- Does the employee make decisions using sound judgment?
- Can the employee make quality and timely decisions?
- Does the employee create a motivating climate while training and developing team members and take corrective action as necessary?
- Can the employee analyze work, set goals, and develop plans of action to get the job done promptly?

How to improve the performance review process

Performance reviews are an integral part of employee job performance expectations and communication, so you want to consistently seek out opportunities to improve the process from beginning to end.

Here are some ways to do that.

- **Provide consistent feedback.** Along with offering regular performance reviews, you also want to provide feedback via check-ins on a more regular basis. It has been found that when employees receive

more frequent feedback, there are higher levels of employee engagement.

- **Build trust.** You want to build and maintain a trusting relationship with your employees to share feedback throughout the year.
- **Follow up.** After the performance review, make it clear that there will be another one and the time frame they should expect it to happen. Also, provide action items, goals, or focus areas until the next performance review meeting.
- **Determine Your Frequency.** You want to determine how frequently you should hold your performance appraisal meetings. Perhaps it's best to hold one covering the entire year, or you'd prefer to have quarterly performance reviews. Ultimately, you want to choose the frequency that will best help your employees, and the company as a whole better collaborate and secure measurable metrics to improve performance.