

Points to Ponder Before Working on this Form

- How do you collect relevant information that should be used in reviews on an ongoing basis?
- Do you journal about your people?
- What's the role of a person's peers relative to their performance review?
- Do you plan ahead so that you are always early with their reviews?

Performance Review Template

Employee:		Emp. Nbr.		Date Last Review:		Date This Review:	
Position Title:			Time in Job:		Time at Co:		

Definitions

Description of Ratings Used in Evaluating Performance

- Outstanding:** Demonstrates mastery in performance of job and/or objectives which far exceed what is expected of a well-trained person in the position.
- Excellent:** Demonstrates achievement in performance of job and/or objectives which exceed what is expected of a well-trained person in the position.
- Meets:** Demonstrates attainment in performance of job and/or objectives in the manner expected of a well-trained person in the position.
- Needs Improvement:** Achievement in performance of job and/or objectives has not been reached and improvement is needed.
- Unsatisfactory:** Complete inability to perform in the manner expected of a basically trained person in the position.
- Not Observed:** Marked if category does not apply, or if person has not been observed for at least three months.

Customer Service Relations

- **Engagement Quality:** Accepts personal responsibility for client satisfaction, understands the needs of the client. Establishes and manages engagement objectives, expectations, and quality plan. Partners with the client and (Company) team members to deliver profitable, high quality client service.
- **Technical Proficiency:** Demonstrates technical competence. Understands, pursues, and communicates trends and key issues.
- **Business Competence:** Participates in crafting business solutions for clients. Demonstrates application and industry competence. Applies business implications to technological solutions. Understands client and organizational dynamics. Protects sensitive information.

Professional Profile

- **Professionalism** Makes a positive first impression. Inspires trust, credibility, and confidence. Maintains a high standard of appearance and demeanor. Demonstrates positive actions and attitudes towards (Company) internal and external clients. Strong ethics.
- **Motivation / Self-Improvement:** Works independently and/or in teams to achieve job objectives. Self-starter. Establishes and follows priorities. Meets deadlines.
- **Communication Skills** Communicates effectively when speaking with individuals and groups. Demonstrates effective and active listening skills. Produces documents which demonstrate clarity in expression and structure.

- **Interpersonal Skills** Establishes and maintains effective working relationships. Demonstrates ability to lead and motivate others. Recognized by peers, supervisors, and clients as a leader and a team player. Accepts and applies constructive criticism.
- **Leadership Skills** Influences and inspires others to accomplish team/company goals by providing direction, purpose and motivation. Demonstrates a high standard and motivates others to achieve high standards. Seeks and takes responsibility. Willingly takes personal risks for the benefit of team and company. Has the confidence of peers?

Skills Development

- **Skills and Mobility:** Demonstrates mastery of enterprise skills consistent with present level of compensation.
- **Training:** Pursues additional skills, knowledge, and training consistent with business unit's objectives. (Training may include self-study courses, independent studies, vendor training, college or university classes, or other training in technical, business, or professional areas). Shares responsibility for personal development, actively sets goals, devotes personal time to professional growth.
- **Client Presentation:** Projects technical and business knowledge with strong professional skills in oral and written form.

Performance Ratings

Customer Service						
Outstanding	Excellent	Meets	Needs Improvement	Unsatisfactory	Not Observed	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Engagement Quality	Technical Proficiency	Business Competence
<input type="checkbox"/> OS <input checked="" type="checkbox"/> EX <input type="checkbox"/> M <input type="checkbox"/> NI <input type="checkbox"/> US <input type="checkbox"/> NO	<input checked="" type="checkbox"/> OS <input type="checkbox"/> EX <input type="checkbox"/> M <input type="checkbox"/> NI <input type="checkbox"/> US <input type="checkbox"/> NO	<input type="checkbox"/> OS <input checked="" type="checkbox"/> EX <input type="checkbox"/> M <input type="checkbox"/> NI <input type="checkbox"/> US <input type="checkbox"/> NO

Professional Profile						
Outstanding	Excellent	Meets	Needs Improvement	Unsatisfactory	Not Observed	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Professionalism	Motivation / Self Improvement	Communication Skills	Interpersonal Skills	Leadership Skills
<input type="checkbox"/> O <input checked="" type="checkbox"/> E <input type="checkbox"/> M <input type="checkbox"/> N <input type="checkbox"/> U <input type="checkbox"/> N <input type="checkbox"/> S <input type="checkbox"/> X <input type="checkbox"/> I <input type="checkbox"/> S <input type="checkbox"/> O	<input checked="" type="checkbox"/> O <input type="checkbox"/> E <input type="checkbox"/> M <input type="checkbox"/> N <input type="checkbox"/> U <input type="checkbox"/> N <input type="checkbox"/> S <input type="checkbox"/> X <input type="checkbox"/> I <input type="checkbox"/> S <input type="checkbox"/> O	<input type="checkbox"/> O <input type="checkbox"/> E <input checked="" type="checkbox"/> M <input type="checkbox"/> N <input type="checkbox"/> U <input type="checkbox"/> N <input type="checkbox"/> S <input type="checkbox"/> X <input type="checkbox"/> I <input type="checkbox"/> S <input type="checkbox"/> O	<input type="checkbox"/> O <input type="checkbox"/> E <input checked="" type="checkbox"/> M <input type="checkbox"/> N <input type="checkbox"/> U <input type="checkbox"/> N <input type="checkbox"/> S <input type="checkbox"/> X <input type="checkbox"/> I <input type="checkbox"/> S <input type="checkbox"/> O	<input type="checkbox"/> O <input type="checkbox"/> E <input checked="" type="checkbox"/> M <input type="checkbox"/> N <input type="checkbox"/> U <input type="checkbox"/> N <input type="checkbox"/> S <input type="checkbox"/> X <input type="checkbox"/> I <input type="checkbox"/> S <input type="checkbox"/> O

Skills Development						
Outstanding	Excellent	Meets	Needs Improvement	Unsatisfactory	Not Observed	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Skills & Mobility	Training	Client Presentation
<input type="checkbox"/> OS <input checked="" type="checkbox"/> EX <input type="checkbox"/> M <input type="checkbox"/> NI <input type="checkbox"/> US <input type="checkbox"/> NO	<input type="checkbox"/> OS <input type="checkbox"/> EX <input type="checkbox"/> M <input type="checkbox"/> NI <input type="checkbox"/> US <input checked="" type="checkbox"/> NO	<input type="checkbox"/> OS <input type="checkbox"/> EX <input checked="" type="checkbox"/> M <input type="checkbox"/> NI <input type="checkbox"/> US <input type="checkbox"/> NO

Management (Managers only)						
Outstanding	Excellent	Meets	Needs Improvement	Unsatisfactory	Not Observed	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Builds Team	Ensures Environment for Success	Develops Individuals	Rewards Performance	Builds Peer Relationships
<input type="checkbox"/> O <input type="checkbox"/> E <input type="checkbox"/> M <input type="checkbox"/> N <input type="checkbox"/> U <input type="checkbox"/> N <input type="checkbox"/> S <input type="checkbox"/> X <input type="checkbox"/> I <input type="checkbox"/> S <input type="checkbox"/> O	<input type="checkbox"/> O <input type="checkbox"/> E <input type="checkbox"/> M <input type="checkbox"/> N <input type="checkbox"/> U <input type="checkbox"/> N <input type="checkbox"/> S <input type="checkbox"/> X <input type="checkbox"/> I <input type="checkbox"/> S <input type="checkbox"/> O	<input type="checkbox"/> O <input type="checkbox"/> E <input type="checkbox"/> M <input type="checkbox"/> N <input type="checkbox"/> U <input type="checkbox"/> N <input type="checkbox"/> S <input type="checkbox"/> X <input type="checkbox"/> I <input type="checkbox"/> S <input type="checkbox"/> O	<input type="checkbox"/> O <input type="checkbox"/> E <input type="checkbox"/> M <input type="checkbox"/> N <input type="checkbox"/> U <input type="checkbox"/> N <input type="checkbox"/> S <input type="checkbox"/> X <input type="checkbox"/> I <input type="checkbox"/> S <input type="checkbox"/> O	<input type="checkbox"/> O <input type="checkbox"/> E <input type="checkbox"/> M <input type="checkbox"/> N <input type="checkbox"/> U <input type="checkbox"/> N <input type="checkbox"/> S <input type="checkbox"/> X <input type="checkbox"/> I <input type="checkbox"/> S <input type="checkbox"/> O

Overall Performance Rating						
Outstanding	Excellent	Meets	Needs Improvement	Unsatisfactory	Not Observed	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Coaching

Accomplishments: Major Projects/Engagements

Project Title	Customer / Business Unit	Role <i>(Lead, Programmer, Q/A, Business Expert)</i>	Contributions	Outcome (Project Goals Met, Quality Deployment, Estimates Maintained)

Goal Progress Measurement

Previously Established Goals & Objectives

Progress & Achievements

Setting Goals and Objectives for the Next Performance Period

Category	Goal	Critical Success Factors	Targeted Result
Career			
Personal			
Client			
Certification			

Reviewer's Comments and Summary:

Signature
Date

Reviewee's Comments:

Signature
Date

Review Contributors: (Company) team members or clients contributing to this evaluation.

	Signature	Date
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Performance Plan (*Optional*)

Required if performance rating in any category is at “Needs Improvement” or “Unsatisfactory.” Include specific items to be addressed along with a way to measure progress, dates/deadlines, milestones, and a future review date to review progress.

Performance Issues: Describe those aspects of the reviewee's job performance that contributed most to his or her NI or US during this appraisal period.

Improvement Indicators: Describe those aspects and characteristics of the reviewee's job performance and/or knowledge that would lead towards improvement.

Performance Plan: Describe the plan. Include date driven deliverables and milestones. Identify the next review time period and identify coaching sessions to be held (i.e., weekly, bi-monthly, monthly, etc., counseling meetings).

Signature
Date

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