

Example Performance Review Form

The Performance Review is an essential tool to ensure accountability, alignment and communication. Every employee will receive a performance Review every 6 months. The performance Review is **NOT** linked to basic salary.

Name:..... Start Date:

Job Title:..... Department:

Date of Review:..... Period being appraised:

Sickness absence for past 12 months: Days: Occurrences:

Lateness for the past 12 months: Late arrival: Late leaving:

Goals From Previous Review

[NB: In all comments sections, add your comments, the employee comments and stakeholder comments as needed.]

	Achieved	Not Achieved	In progress	Comment
Goal 1: Design and implement new sales training program for onboarding.	Yes			<i>E.g. Excellent work, feedback from stakeholders and participants is excellent. This has had a big impact on the business and our customers are better served by our new salespeople.</i>
Goal 2: Hire 3 new sales associates.		No		<i>E.g. This goal was not achieved in the last review period.</i>

Performance

Scoring Key	1 (Must improve)	2 (Needs attention)	3 (Average)	4 (Good)	5 (Excellent)
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Company Values:

	Score and Comment.
e.g. Acts with courage	<i>e.g., 4/5. You have showed courage in many areas of your work. You approached a difficult client in X and this led to a large contract. I would like to see you showing courage in self advocate in team meetings. But I think that this will come with time as you get to know the team more.</i>
Pays care and attention to detail	
Contributes to team success	

Role Specific Performance (From the job description):

Responsibility	Score and Comment.
e.g., Plan sales activities to achieve sales targets.	<i>e.g., 5/5. you have planned and executed in a highly effective way and this has had a huge positive impact on the business.</i>
Prospect new clients by reaching out for sales calls.	
Execute sales calls.	
Accurately records all sales activities on the CRM.	
Work closely with the operations team on project delivery.	
Contribute to organizational success by attending key internal meetings and working on capability building projects.	
Continuously build network and brand visibility by attending events and presenting at conferences.	

Comments and commitments:

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KPI Specific Performance

Responsibility	Score and Comment.
e.g. Sales Calls per week v Target	10 sales call per week. 80% of target
e.g. Sales Calls to closing ratio.	10%, 1 signed contract per 10 sales call (70% of target)

Comments and commitments:

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Goals for the Next 3-months:

	Detail/scope and deliverables.	When (milestones and deadline)	Who (identify stakeholders)	Measurables
e.g., Hire 3 new team members for the sales team.	3-entry level sales associates.	By June 31 st 2022	HR Manager, Head of Sales, Accountant	3 employee contracts signed.

Personal Development Plan:

Add your personal development plan for the next 6 months. Add work related and life goals related plans.

	Detail/scope and deliverables.	When (milestones and deadline)	Who (identify stakeholders)	Measurables
e.g., accounting training with a view to P&L management.	1. Take a training certification on budgeting and forecasting. 2. Do the Q4 exercise with the Head of Sales.	By June 31 st 2022.	Head of Sales, L&D manager.	Certification of course completion. Submission and approval of Q4 sales forecasts and budget by CFO.
2.				
3.				

Overall

[Comment on the overall performance from the previous period. This is your personal commentary on how the employee has performed given all of the data and information contained in the performance review.]

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Signed..... Signed

Manager

Department Head

Signed

Employee