|  |  |  |  |
| --- | --- | --- | --- |
| Employee name |  | Team |  |
|  |  |  |  |
| Review period |  | Date of review |  |

Overview for quarter – complete post meeting

|  |  |  |  |
| --- | --- | --- | --- |
| OVERALL PERFORMANCE | GOALS ACHIEVED | IMPROVEMENT | CORE VALUES |
| 1.  | 1.  | 1.  | 1.  |
| 2.  | 2.  | 2.  | 2. |
| 3.  | 3.  | 3.  | 3.  |
| 4.  | 4.  | 4.  | 4.  |
| 5.  | 5.  | 5.  | 5. |
| Manager comments: | Manager comments: | Manager comments: | Manager comments: |

Employer to complete before meeting

|  |  |
| --- | --- |
| GOALS FROM PREVIOUS QUARTER | ACHIEVEMENTS / OUTCOMES |
| 1.  |  |
| 2.  |  |
| 3.  |  |
| 4.  |  |
| 5.  |  |

Manager and employee to discuss during the review meeting

|  |  |
| --- | --- |
| GOALS FOR NEXT QUARTER | TRAINING OR PROFESSIONAL DEVELOPMENT |
| 1.  |  |
| 2.  |  |
| 3.  | EMPLOYEE COMMENTS: |
| 4.  |
| 5.  |

|  |  |
| --- | --- |
| Manager name:­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature: | Employee name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature: |

INSTRUCTIONS

Page One – Overview for quarter

This section should be completed after the review by summarising the outcomes of your conversation.

Overall Performance

During your meeting you will have prepared questions to ask your employee that relate to their overall performance. For example: What was your biggest achievement this quarter? What has been the most challenging aspect of your role? What motivates you?

Summarise the results of what you discuss and add to this column.

Add your final feedback.

Goals Achieved

Prior to the review meeting send this document to your employee (without these instructions) and ask them to complete page two. They will need to add their goals from the previous quarter and provide feedback on what they have achieved and any roadblocks that have prevented them from reaching their objectives.

Reviewing goals will be the main topic for discussion. Summarise the results and add in this section.

Add your final feedback.

Improvement

During the review there will be many conversations you have that relate to the job and the future. In this column you will summarise any improvements that need to be made. This can include any roadblocks that you, as the manager, need to clear so that the employee has a fair chance of achieving their goals. You can also include training requirements, or career progressions comments.

Add your final feedback.

Core Values

Consider how well the employee aligns with the company’s culture and values. For example, if one of the core values is ‘customer comes first’, assess if the employee’s behaviour aligns with that principle. Another value could be ‘honesty and integrity’, are they aligned or could your employee make some improvements in this area. List your core values and evaluate each in this column.

Add your final feedback.

Page Two – Specific goals and achievements

This section should be completed by the employee before the meeting. They don’t need to send it to you prior to but they must bring it to the review to discuss with you.

 Goals from previous quarter

Ask the employee to transfer their goals from the previous quarter into the first column and to provide their own feedback on whether they have achieved them or if anything happened that prevented them from doing so.

If this is the first performance review, then the goals for the coming quarter will be added to page three.

Any comments you have will be added to page one’s overview.

Page Three – Next quarter goals and professional development

This section should be completed during the performance review.

 Goals for next quarter

This is agreed during the meeting. The employee can use the document to take notes then type the new goals in later before handing back for you to complete the final overview on page one.

Training or professional development

Again, this is something you should include in your conversation. Providing training and professional development opportunities are important for the business and for retaining your key employees.

 Employee comments

 This is an opportunity for the employee to provide input on how well they felt they went, any concerns they have e.g., any roadblocks they need cleared.

Signatures

After the entire document has been completed including the overview page the document should be signed by you and the employee. This ensures you both agree with the status / comments, and future expectations.