The Ultimate Performance Review Template

Getting the Most Out of Your Performance Review Template

Structured and precise performance reviews provide actionable feedback that motivates employees and helps set clear goals for the year ahead. When done well, performance reviews increase employee retention and improve productivity. Whether you conduct reviews on a quarterly, bi-annual, or annual basis, it's important to have a consistent and clear structure in place to get the most out of the process.

This customizable performance review template provides a comprehensive, easy to follow structure to guide your performance review process for both managers and employees. You can customize each section to best suit your organization's needs, and draw inspiration from our examples in the response fields.

With Omni HR's all-in-one platform, you can digitize, customize, and automate your entire performance review process on one, easy-to-use platform. Create custom forms, automatically distribute and track progress, and easily gather data from reviews in just a few clicks.

Learn how Omni HR helps streamline and standardize your performance review process.

Book a demo

Employee Performance Review Template

EMPLOYEE INFORMATION	
Employee Name	**Job Title**
Manager Name	**Review Period** **From:** / / **To:** / /

CORE VALUES AND OBJECTIVES		
PERFORMANCE CATEGORY	**RATING**	**COMMENTS AND EXAMPLES**
Quality of Work: Work is completed accurate (few or no errors), efficiently and within deadlines with minimal supervision	☐ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	Ex: Faizal consistently delivers his projects on deadline with good quality in put. Last quarter he completed a software update that improved UX and contributed to our 2023 goal of rolling out a new feature for our customers.
Leadership: Effectively and efficiently runs a team while giving clear guidance.	☐ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	Ex: Sofia exhibits strong leadership skills and provides clear and effective guidance to her team. This year she led her team to complete several challenging projects such as launching a new onboarding program.

Reliability/Dependability: Consistently performs at a high level; manages time and workload effectively to meet responsibilities	☐ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	Ex: Grace manages to deliver on her core responsibilities with quality work, but has room to grow on her timeliness. In the last quarter her reports were repeatedly late and I had to follow up with her to get status updates. We will work together to map out her project timelines to improve her ability to meet deadlines.
Communication Skills: Written and oral communications are clear, organized and effective; listens to and comprehends peers	☐ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	Ex: Paul struggles to clearly communicate with his peers when it comes to status updates. His emails often lack key details necessary for project management. We will create an email template for him to use to ensure key details are communicated to his team.
Judgement & Decision-Making: Makes thoughtful, well-reasoned decisions; exercises good judgment, resourcefulness and creativity in problem-solving	☐ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	Ex: Nergui exhibits strong judgment and reasoning skills. When faced with a problem, they have shown discernment, weighing out several options and choosing the solution that best serves business objectives.
Initiative & Flexibility: Demonstrates initiative, often seeking out additional responsibility; identifies problems and solutions; thrives on new challenges and adjusts to unexpected changes	☐ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	Ex: Hana struggles with her ability to adapt to changing circumstances. When faced with a roadblock, she often waits to hear other solutions rather than take initiative to determine the best path forward. I will recommend some problem-solving training exercises to help her strengthen this skill.
Cooperation & Teamwork: Respectful of colleagues when working with others and makes valuable contributions to help the group achieve goals	☐ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	Ex: Andre has proven an excellent teammate to his peers. He often calls colleagues in, asking for their feedback and opinions and initiates team brainstorms to tackle projects.

JOB-SPECIFIC PERFORMANCE CRITERIA

PERFORMANCE CATEGORY	RATING	COMMENTS AND EXAMPLES
Knowledge of Position: Possesses required skills, knowledge, and abilities to competently perform the job	☐ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	Ex: Luca has exhibited their knowledge and competency through successful results and serving as a leader to their team. They've been able to train new employees on best practices and exhibit a strong understanding of their field.
Training & Development: Continually seeks ways to strengthen performance and regularly monitors new developments in field of work	☐ Exceeds expectations ☐ Meets expectations ☐ Needs improvement ☐ Unacceptable	Ex: Chloe is regularly bringing new learnings to her role and sharing resources with her team to continue their education. She has completed 2 certificates in the last year that have increased her skills and improved her performance.

PERFORMANCE GOALS

What goals can the employee set over the next quarter to improve their performance?

Ex: Nur can set 3 main goals to help them achieve continued growth and role competency. These goals are:

1. Enroll in a course to learn how to leverage AI for content creation
2. Set targets for audience growth across social media platforms
3. Build a pipeline to repurpose our event content for blogs and podcasts

OVERALL RATING

EXCEEDS EXPECTATIONS	MEETS EXPECTATIONS	NEEDS IMPROVEMENT	UNACCEPTABLE
Employee consistently performs at a high level that exceeds expectations	Employee satisfies all essential job requirements; may exceed expectations periodically; demonstrates likelihood of eventually exceeding expectations	Employee consistently performs below required standards/expectations for the position; training or other action is necessary to correct performance	Employee is unable or unwilling to perform required duties according to company standards; immediate improvement must be demonstrated

Share any additional comments about the employee's performance.

Ex: Van has shown signs of growth since his last performance review and continues to express enthusiasm and interest in his role. I encourage him to continue taking on projects that interest him as he considers his long term goals in his career.

ACKNOWLEDGEMENT

I acknowledge that I have had the opportunity to discuss this performance evaluation with my manager/supervisor and I have received a copy of this evaluation.

Employee Signature: Date:

Reviewer Signature: Date:

To access your customizable form, download here and make a copy.

Employee Self-Evaluation Performance Review Template

EMPLOYEE INFORMATION	
Employee Name	**Job Title**
Manager / Reviewer	**Review Period** From: / / To: / /

CORE VALUES AND OBJECTIVES		
Quality of Work: My work is completed accurate (few or no errors), efficiently and within deadlines with minimal supervision	**How have I excelled in this category?** Ex: This year I planned, oversaw, and delivered a new onboarding program for new employees. This was a need I identified in the company and took on without being prompted from my manager. I've successfully launched the program and we've received positive feedback from employees.	**Where can I improve in this category?** Ex: While I've excelled at identifying needs and creating projects for my role, I have struggled with updating my tasks on Asana to communicate with my peers on the status of action items. I have added a calendar reminder on Friday mornings to dedicate time to updating project actions to ensure I don't forget.

Leadership: I can effectively and efficiently run a team while giving clear guidance.	**How have I excelled in this category?** Ex: I communicate clearly and effectively with my team so they have the tools and clarity they need to achieve their best outcomes. One way I achieve this is by setting aside 15 minutes before each meeting to review the key objectives and action items I'd like to focus on for that call.	**Where can I improve in this category?** Ex: I am working on incorporating more positive feedback and celebrating my team's achievements in our weekly meetings.
Reliability/Dependability: I consistently performs at a high level; I manage my time and workload effectively to meet responsibilities	**How have I excelled in this category?** Ex: I have met key deadlines for major projects and often delivered resources ahead of schedule. I use tools like Asana to carefully track my responsibilities to help me deliver all materials in a timely and accurate fashion.	**Where can I improve in this category?** Ex: I have learned I struggle to set boundaries with my colleagues when they ask for my help on projects. This results in me taking on too many tasks and falling behind on my work. I am working on prioritizing my responsibilities and clearly communicating my bandwidth to my peers and manager.
Communication Skills: My written and oral communications are clear, organized and effectives; I listen to and comprehend my peers	**How have I excelled in this category?** Ex: I set aside 15-20 minutes before every meeting to take stock of what topics I'd like to cover and any important information I need to communicate. This helps me keep my meetings on track, and ensure I effectively communicate important information to my colleagues and managers.	**Where can I improve in this category?** Ex: I've learned that while I communicate proactively and clearly via email and slack, I struggle with speaking up in meetings. In the future I will challenge myself to contribute at least one idea verbally during meetings.

Judgement & Decision-Making: I make thoughtful, well-reasoned decisions; exercise good judgment, resourcefulness and creativity in problem-solving	**How have I excelled in this category?** Ex: I approach roadblocks and challenges with a growth mindset. This past quarter when our engagement numbers dropped on social media, I researched and incorporated new mediums for content to increase engagement.	**Where can I improve in this category?** Ex: I have found I don't excel at problem solving when put on the spot. In the future, I've asked my managers and colleagues to share brainstorming prompts with me prior to our meetings so I have time to gather my thoughts and ideas and contribute solutions during our meetings.
Initiative & Flexibility: I demonstrate initiative, often seeking out additional responsibility; identify problems and solutions; thrive on new challenges and adjust to unexpected changes	**How have I excelled in this category?** Ex: I have demonstrated strong initiative and ownership in my work, leading the successful completion of multiple projects on time and within budget. I've done so by setting SMART goals for myself at the beginning of each quarter to ensure I remain on track and focused.	**Where can I improve in this category?** Ex: I tend to get excited about my ideas and dominate meetings leaving little time for others to contribute. I am working on this by sharing one idea and then asking others their opinions before going through all of my thoughts.
Cooperation & Teamwork: I am respectful of colleagues when working with others and make valuable contributions to help the group achieve goals	**How have I excelled in this category?** Ex: Last quarter I put a call out to our engineering team for guest posts for our company blog. I recognize that other departments' expertise and input are valuable to our brand and our collaboration can boost our marketing efforts.	**Where can I improve in this category?** Ex: I struggle to initiate collaborations with new team members because I am concerned that they will feel overwhelmed. I am learning to check in with these new employees and gauge their interest and bandwidth rather than assume they're unable to collaborate.

JOB-SPECIFIC PERFORMANCE CRITERIA

Knowledge of Position: I possess the required skills, knowledge, and abilities to competently perform my job	**How have I excelled in this category?** Ex: I have completed my job training with my manager and am able to complete my tasks with little to no guidance. I feel confident in my ability to use the necessary tools and have a strong understanding of how to achieve the OKRs for my department.	**Where can I improve in this category?** Ex: I would like to improve my understanding of how the marketing department can better support the sales team. I've implemented a weekly call with the sales team to align on goals and determine how we can best support their efforts with our marketing materials.
Training & Development: I continually seek ways to strengthen my performance and regularly monitor new developments in my field	**How have I excelled in this category?** Ex: I've grown my knowledge in SEO this year by attending 3 certification webinars that have helped me improve our blog indexing to grow our organic audience.	**Where can I improve in this category?** Ex: With AI becoming more relevant in marketing practices, I have an opportunity to learn how to leverage these new tools to increase our competitiveness in the market. In the next quarter, I plan to take a course and watch tutorials on how to utilize AI for content writing.

ACHIEVEMENTS

What achievements have you made since your last performance review? Be specific.

Ex: I successfully launched an onboarding program for new hires in Q1. To do this I researched best practices, and developed materials such as onboarding checklists and standardized our company welcome letter to create consistency and help ensure all bases were covered.

PERFORMANCE GOALS

What role specific goals are you setting for the next quarter? How do you plan to achieve them?

Ex: My main goal for next quarter is to improve the design and functionality of our products by increasing and improving customer feedback. I plan to do that by:

- Organizing a quarterly meeting to discuss our product roadmap and create a feedback form by Q3 for users to share feedback on our product features.
- Holding a strategy meeting with sales to determine key questions to ask during sales calls to increase customer insight and implement by next month.
- Implement a feedback form onto the company website by the end of next week, and download responses to review during weekly check in.

DEVELOPMENT PLANNING

What kinds of professional development activities would you like to carry out next year? What information or support do you need to accomplish these activities?

Ex: Working with Excel is 30% of my job responsibilities. As I progress at the company, I'll be required to spend 50% of my time creating spreadsheets in Excel. My ability to proficiently use Excel will allow me to progress in my career.

In the next 6 months I will complete an Excel course, watch tutorials, and take practice tests to improve my skills before my next performance review.

I would like the support of my manager to identify the best programs to enroll in to reach this goal.

ADDITIONAL COMMENTS

Is there anything additional you'd like to add that was not covered in this self-evaluation?

Ex: I've greatly enjoyed growing in my role over the past year, and feel I have shown great leadership and initiative in developing core systems and projects to move the department forward. In the next year, I'd like to be considered for growth opportunities within the engineering department and am open to discussing how I can best prime myself for these opportunities.

ACKNOWLEDGEMENT

I acknowledge that I have had the opportunity to discuss this performance evaluation with my manager/supervisor and I have received a copy of this evaluation.

Employee Signature: Date:

Manager Signature: Date:

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About Omni

Omni is an all-in-one HR management software on a mission to help modern companies build engaged, high-performing teams. Until now, there is no employee management software that is built to holistically support the end-to-end employee lifecycle.

Most HR teams and managers end up managing part (or all) of their people processes manually and losing valuable time syncing data across different teams and disjointed systems.

We believe that the world of work has changed – so we're building the tools for it.

Omni is creating a customizable all-in-one HR solution that adapts to how companies operate. We want to help organizations streamline their entire employee management lifecycle and turn complex, manual processes into intuitive, automated workflows.

With Omni, HR managers and business owners can free up valuable time to focus on what matters most for their business.

To see Omni in action, schedule a product tour, or visit us at https://omnihr.co/.

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