Employee review template

Blank template. Replace each [prompt]; keep one dated example for every rating.

```
Employee: [full name]                    Job title: [title]
Department: [team]                       Reviewer: [manager name, title]
Review type: [annual / mid-year / quarterly / 90-day / project]
Review period: [YYYY-MM-DD] to [YYYY-MM-DD]   Meeting date: [YYYY-MM-DD]
```

RATING SCALE

```
5 Exceptional: consistently exceeds the standard; others learn from this work
4 Exceeds: often goes beyond what the role requires
3 Meets: reliably delivers what the role requires
2 Developing: meets some expectations; needs support in named areas
1 Below: does not yet meet the standard; a written improvement plan follows
```

GOALS FROM LAST PERIOD

```
Goal 1: [goal as agreed]
  Result: [what happened, with numbers and dates]          Rating: [1-5]
Goal 2: [goal as agreed]
  Result: [what happened, with numbers and dates]          Rating: [1-5]
Goal 3: [goal as agreed]
  Result: [what happened, with numbers and dates]          Rating: [1-5]
```

COMPETENCIES (rate each; one dated example per rating)

```
Job knowledge and skills         Rating: [1-5]  Evidence: [example, date, link]
Quality of work                  Rating: [1-5]  Evidence: [example, date, link]
Productivity and reliability     Rating: [1-5]  Evidence: [example, date, link]
Communication                    Rating: [1-5]  Evidence: [example, date, link]
Collaboration                    Rating: [1-5]  Evidence: [example, date, link]
Problem-solving and initiative   Rating: [1-5]  Evidence: [example, date, link]
[Role-specific competency]       Rating: [1-5]  Evidence: [example, date, link]
```

SELF-REVIEW (employee completes before the meeting)

```
What I am most proud of this period: [answer]
A challenge I faced and how I handled it: [answer]
Where I need support: [answer]
Goals I propose for next period: [answer]
```

MANAGER SUMMARY

```
Key strengths (2-3, each with an example): [answer]
Growth areas (1-2, each with an example): [answer]
Overall rating: [1-5]   How it was reached: [weights or written rationale]
```

GOALS FOR NEXT PERIOD

```
Goal 1: [specific outcome]   Measure: [metric and target]   Check-in: [date]
Goal 2: [specific outcome]   Measure: [metric and target]   Check-in: [date]
```

Employee review template (continued)

Blank template. Replace each [prompt]; keep one dated example for every rating.

Goal 3: [specific outcome] Measure: [metric and target] Check-in: [date]

DEVELOPMENT PLAN

Skill or behavior: [what to build] Action: [course, project, mentoring]
Support from manager: [time, budget, access] Due: [date]

COMMENTS AND SIGNATURES

Employee comments: [optional; attach a page if needed]
Employee signature / date: [signing confirms the review was discussed]
Manager signature / date: [signature]
Second-level or HR review / date: [if your policy requires it]

Employee review example (fictional)

Completed mid-year review for a customer support specialist, from the guide.

Employee: Maya Torres (fictional) Job title: Customer Support Specialist
Department: Customer Support Reviewer: Daniel Okafor, Support Team Lead
Review type: mid-year
Review period: 2026-01-01 to 2026-06-30 Meeting date: 2026-07-09

GOALS FROM LAST PERIOD

Goal 1: Keep CSAT at or above 92% on handled tickets
  Result: 94.1% across 1,184 rated tickets (team average 91.3%) Rating: 4
Goal 2: Cut first-response time on email tickets from 6h to under 4h
  Result: 3h 40m median from April after inbox rules change Rating: 4
Goal 3: Publish 6 help-center articles for top ticket drivers
  Result: 3 published, 2 in draft; refund article cut repeat tickets Rating: 2

COMPETENCIES (rate each; one dated example per rating)

Job knowledge and skills	Rating: 4	Evidence: billing escalations 03-12
Quality of work	Rating: 4	Evidence: 2 QA flags in 60 reviews
Productivity and reliability	Rating: 3	Evidence: met queue targets 5 of 6 mo
Communication	Rating: 4	Evidence: outage macro reused team-wide
Collaboration	Rating: 5	Evidence: trained 2 new hires in May
Problem-solving and initiative	Rating: 4	Evidence: proposed inbox rules, Mar
Writing for the help center	Rating: 2	Evidence: 3 of 6 articles shipped

SELF-REVIEW (employee completes before the meeting)

What I am most proud of this period: onboarding Priya and Sam in May.
A challenge I faced and how I handled it: the March outage queue; I wrote a
  shared macro and took the evening shift twice.
Where I need support: protected time for help-center writing.
Goals I propose for next period: finish the article backlog; learn Tier 2.

MANAGER SUMMARY

Key strengths: customer satisfaction above team average on high volume; the
  inbox rules Maya proposed cut median first response by over 2 hours; new
  hires reached full queue load one week early with her training.
Growth areas: help-center writing slipped when queues spiked; 3 of 6
  articles shipped. The refund article alone cut repeat refund tickets 18%.
Overall rating: 4 (Exceeds) How it was reached: goals 50%, competencies 50%;
  goals 3.33, competencies 3.71, weighted 3.52; team bands: 3.50-4.49 = 4.

GOALS FOR NEXT PERIOD

Goal 1: Ship the 3 remaining articles Measure: published Check-in: 08-15
Goal 2: Handle Tier 2 billing tickets Measure: 20/week, QA 90%+ Check-in: 09-30
Goal 3: Keep CSAT at or above 92% Measure: monthly CSAT Check-in: monthly

Employee review example (fictional) (continued)

Completed mid-year review for a customer support specialist, from the guide.

DEVELOPMENT PLAN

Skill or behavior: Tier 2 billing Action: shadow Tier 2 lead 2h/week in July
Support from manager: 3h/week blocked for writing Due: 2026-09-30

COMMENTS AND SIGNATURES

Employee comments: agree; asked to pair with a writer on the first article.
Employee signature / date: M. Torres 2026-07-09
Manager signature / date: D. Okafor 2026-07-09