



Performance Review Template





A performance review is an opportunity to reinforce strengths, discuss opportunity areas and ensure employees are on track with company goals and objectives.

74%

**74% of millennial employees said they felt like they were
“in the dark” about their performance.**

(TriNet and Wakefield)

Don't avoid this opportunity to share room for improvement or positive reinforcement with your employee. A Performance Review Template is a great starting point for facilitating positive conversations about an employee's performance. Once downloaded, the template can be customized to meet the needs of your organization.

How to Use this Document:

You will first see the performance review template. Following this is a second version with fully editable text so you can customize the policy to the needs of your organization.

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PERFORMANCE REVIEW TEMPLATE – SAMPLE

Performance reviews should facilitate a supportive and positive conversation that leaves the employee with a clear understanding of their expectations and goals. Use this template as a guide to help you conduct performance reviews with your team. Select and edit questions that fit your specific industry and core values. These questions can be answered with written responses or a rating scale.

ALIGNMENT WITH COMPANY MISSION

Examine your company's mission and goals to identify specific questions that will provide you with useful information about the employee's past performance and how they can continue being successful or improve.

- How is (employee name) successfully working towards the company mission?
- How is (employee name) successfully working towards the mission of their job description?

PAST PERFORMANCE

These questions are based on the employee's past performance over the last quarter, half of year, or full year. These questions should be designed to gather information about the employee's successes and acknowledge their hard work and accomplishments. These questions should also identify areas of improvement and how you can help them reach their goals moving forward.

- What is a notable accomplishment that the employee has achieved this quarter?
- Did the employee achieve their goals?
- Were there challenges that the employee overcame while achieving their goals?
- What resources were utilized for the employee to achieve their goals?
- Was there a specific colleague who played an important role in achieving your goals and providing feedback?
- What forms of feedback were given to the employee?
- How does the employee receive feedback?
- How has the employee provided feedback to the team?
- How has the employee's performance positively impacted the company?
- Are there areas of the employee's performance that need improvement?

GOALS / ACCOMPLISHMENTS

- What has the employee accomplished over the last quarter?
- Did the employee meet their core competencies over the last quarter?
- What are the areas or projects where you felt the employee excelled and/or demonstrated growth?
- How does the employee exhibit signs of ownership in their work?
- How does the employee make an effort to keep skills current?



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EMPLOYEE STRENGTHS

- What are three strengths that the employee has shown over the last quarter?
- How has the employee improved over the last quarter?
- How has the employee brought value to their team?
- What personalized skills do you believe the employee uses effectively?
- How does the employee's personalized strengths contribute to company goals?
- What is something the employee can do more of?
- Does the employee possess strengths that are known company-wide? If so, how can they best be utilized?
- How well does the employee adapt to new methods or ideas?

AREAS TO IMPROVE

- Are there areas of improvement needed for the employee to be more successful?
- Is the employee currently addressing any low performance issues?
- What steps are being taken to improve performance?
- Has the employee engaged with their Performance Improvement Plan?
- Are there additional steps needed to improve the employee's performance?
- What skills can the employee use more effectively?
- What's one thing the employee should do less of?

CURRENT PERFORMANCE

These questions are based on how the employee is feeling now and what they may be currently working on.

- Was the employee able to meet the specific expectations of their role? Why or Why not?
- Does the employee have a clear understanding of their responsibilities and job duties?
- How does the employee's responsibilities help the company reach their goals?
- Does the employee utilize their skills and produce quality work?
- Does the employee effectively problem solve?
- Does the employee regularly try to come up with new and innovative ideas and suggestions to enhance our services?
- What kind of environment encourages the employee's productivity?
- Do you believe the employee is being challenged?
- Is there anything that you would change about your current role? Is there anything you would change within the department?
- Given what I know of this person's performance, would I always want them on my team? Is this person ready for promotion today? Elaborate on response, including examples of performance or skills that may require additional training or improvement.



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OTHER

MANAGER RELATIONSHIP

- What motivates you?
- Do I communicate with you regarding challenges?
- What can I do to make your job performance more successful?
- What can you do to make your job performance more enjoyable?
- How can I better manage you?
- How can I improve our manager/employee relationship?
- How can I create more personalized learning opportunities for you?
- Do I provide ongoing employee recognition and feedback when it is deserved?
- Do I provide ongoing feedback with concerns regarding your performance?

FUTURE PERFORMANCE (MANAGER-ONLY EVALUATION QUESTIONS)

- Would you promote the employee today based on their past performance?
- Where do you see the employee within the next year?
- What skills development or training would you recommend for the employee?
- How can the employee grow or professionally develop over the next quarter?
- How will I help support the employee to reach their future goals?
- How may I be able to improve managing the employee?

GOALS / EXPECTATIONS (PERFORMANCE IMPROVEMENT) (MANAGER-ONLY EVALUATION QUESTIONS)

- How can the employee improve their performance over the next year?
- What can I do better to support the employee in meeting their goals?
- What are challenges the employee is facing while meeting their goals?
- What resources are available to encourage the employee to reach their goals?
- What tangible steps can be taken in order to achieve or gain traction on their goals?

CULTURAL CONTRIBUTION (MANAGER-ONLY EVALUATION QUESTIONS)

- Is the employee engaged in the company culture?
- Does the employee participate and contribute during company meetings and events?
- Does the employee approach their interactions with coworkers in a respectful, professional, and kind manner?
- Does the employee regularly collaborate with colleagues?
- Does the employee communicate well with their team?
- How has the employee collaborated within their team?
- What feedback have you received from the employee's peers or other managers that interact with employee on a regular basis?
- Does the employee demonstrate cooperation and collaboration while working with other department and colleagues?

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