



# THE TOTAL

## Performance Review

kit



# What's in the kit?

- 200 Performance Review Phrases
- Performance Review Questions
- Performance Review Email Templates
- Performance Review Template





# 200 performance review phrases

For Managers

We can do this  
*together!*



## Introduction

We get it, reviews can be a daunting task for employees and managers involved. Especially for first-time managers who are inexperienced and have little training in giving feedback. Or maybe you're part of a growing company that doesn't use performance appraisal software and doesn't have sophisticated employee development processes.

But here's the thing. Employees value regular and short cycles of feedback. The performance reviews can be quarterly or bi-yearly. Knowing what to say and how to best frame your feedback can make a big difference in how your employees respond and perform in the future.

So, whether you're new to the process or just want to feel confident before giving feedback, we've created a list of performance review phrases that you can save and refer to.

- 1 Communication
- 2 Problem-solving
- 3 Time management
- 4 Attitude and dependability
- 5 Performance and work quality
- 6 Adaptability
- 7 Leadership
- 8 Initiative
- 9 Coaching and development
- 10 Interpersonal skills and teamwork

Keep in mind that these examples should inspire you. However, we believe an individualized approach is most effective in helping employees improve and grow in their careers.

# 1. Communication

Clear and effective communication is crucial for a team to thrive. As a manager, it's important to highlight how your employees' communication skills may promote or reduce efficiency and productivity. These phrases will be useful when evaluating your employee's communication skills:

## Phrases for meeting expectations

- 1 Display a strong drive for collaboration
- 2 Ensure questions are clarified before taking actions that impact outcomes
- 3 Able to articulate complex and technical concepts in plain language
- 4 Keep all stakeholders up to speed on the project's progress and delivery
- 5 Take and share meeting notes and progress updates regularly
- 6 Ask questions and share information with the team
- 7 Encourage every member of the team to share their ideas in meetings
- 8 Is willing to share expertise with colleagues to improve their performance
- 9 Demonstrate the ability to delegate tasks fairly
- 10 Share ideas on how to improve the inclusiveness in the workplace

# Phrases for not meeting expectations

- 1 Make other team members feel alienated
- 2 Tend to avoid or delay delegating tasks during projects
- 3 Is quiet and reluctant to share ideas and knowledge during team meetings
- 4 Never ask or offer help to fellow team members
- 5 Show reluctance to provide feedback to other colleagues, even when asked
- 6 Unable to take on constructive criticism
- 7 Failed to keep team members updated on important project developments
- 8 Become overly intimidated when asked to make a presentation or public speaking
- 9 Written communication skills are sub-optimal
- 10 Poor email etiquettes

## 2. Problem-solving

Employing people with strong problem-solving skills allows companies to continually create new, more relevant ways to deliver value. But be mindful that not every employee is a natural problem-solver. It requires a mixture of initiative, creativity, and self-confidence. Use the following phrases to evaluate employee's problem-solving capabilities

### Phrases for meeting expectations

- 1 Evaluate challenges from all angles before deciding on a course of action
- 2 Willing to collaborate with peers to find solutions to problems
- 3 Resolve customer complaints professionally and quickly
- 4 Able to make decisions and stick to them
- 5 Take full responsibility for any issues with assigned tasks
- 6 Approach problems in a creative and analytical way
- 7 Work well under pressure or time constraint
- 8 Articulate issues clearly and concisely so that everyone can understand
- 9 Remain calm when assessing situations and proposing solutions
- 10 Adapt and listen to other people's perspectives about how to resolve issues

## Phrases for not meeting expectations

- 1 Does not listen to other people's ideas and opinions
- 2 Unable to articulate problems in a comprehensive manner
- 3 Indecisive when it comes to coming up with solutions
- 4 Rush to make decisions without considering the consequences
- 5 Fail to monitor progress to ensure that they deliver the desired results
- 6 Never learn from past accomplishments or failures
- 7 Get flustered or lash out at peers or subordinates when in tough situations
- 8 Unwilling to collaborate with others to brainstorm solutions to problems
- 9 Fail to provide the team with the appropriate amount of structure and direction
- 10 Deal with customer-related issues in an unprofessional manner



# 3. Time management

With more companies adopting remote and hybrid work, they prioritize less on punctuality and attendance, yet time management remains an important value to encourage in employees. These phrases will be useful when evaluating your employee's time management capabilities

## Phrases for meeting expectations

- 1 Accurately predicts the time needed to complete a project
- 2 Manage and organize their time efficiently to meet deadlines
- 3 Respect other people's time
- 4 Develop efficient time management methods
- 5 Excel at prioritizing tasks and following the schedule
- 6 Seek assistance to solve a problem quickly and avoid falling behind
- 7 Maintains a balance between the speed of delivering work with quality
- 8 Demonstrate a commitment to making improvements in both aspects
- 9 Know what has to be done and what should not be done
- 10 Use of technical tools to complete work more quickly

# Phrases for not meeting expectations

- 1 Occasionally (or frequently) fail to meet deadlines
- 2 Under or overestimate how long it will take to complete tasks
- 3 Underdeliver in terms of quality when under pressure or tight deadline
- 4 Struggle to prioritize tasks and project management
- 5 Does not respect other people's time when it comes to meetings and project
- 6 Rarely asks for help to solve a problem and ends up struggling to deliver on time
- 7 Spend a lot of time crafting excuses and lacks a sense of urgency
- 8 Constantly feels overwhelmed and blames others when work is delivered late
- 9 Ignore deadlines and constantly procrastinates
- 10 Allow tasks to pile up, rushes at the last minute, and ultimately falls behind others

# 4. Attitude and dependability

An employee's attitude towards work and colleagues determines their credibility. When employees understand the value of their work and responsibility, they are more likely to take ownership of their work. Use the following phrases to evaluate employee's attitude:

## Phrases for meeting expectations

- 1 Demonstrate a positive attitude and treat others with kindness and respect
- 2 Extremely good at listening to directions and following through
- 3 Makes others feel comfortable about asking questions and giving suggestions
- 4 Accepts and shows accountability for mistakes when they happen
- 5 Acknowledge the accomplishments of other team members
- 6 Take pride in their work and consistently delivers good results
- 7 Receptive to constructive criticism and always utilize it to improve performance
- 8 Always responds promptly to any situation
- 9 Deliver consistent work
- 10 Volunteer to help those in need

# Phrases for not meeting expectations

- 1 Does not always follow through with a project or task
- 2 Avoid engaging with colleagues to celebrate accomplishments and learn from them
- 3 Occasionally or often blames others for their mistakes when they occur
- 4 Has difficulty following instructions and fails to seek clarification
- 5 Demonstrate a superior attitude and lack of respect for other people's expertise
- 6 Can handle complex tasks as long as they receive guidance from colleagues or manager
- 7 Possess the expertise to do the job well, but lacks the discipline and drive to go above and beyond
- 8 Work well independently but is not a reliable team member
- 9 Perform well in most situations but sometimes gets overwhelmed by complex problems
- 10 Does not take feedback seriously and thereby deviates from completing the tasks

# 5. Performance and work quality

This is one of the most important and difficult requirements when it comes to evaluating employee's performance. Thus, the words and expressions you use should be carefully chosen. These phrases will be useful when evaluating the quality of your employee's work:

## Phrases for meeting expectations

- 1 Detail-oriented and results-oriented
- 2 Strive to deliver high-quality services
- 3 Openly embraces feedback for optimal results
- 4 Celebrate high-quality work from colleagues
- 5 Spend extra time on projects to ensure high-standard deliverables
- 6 Strive to find new ways to deliver better value
- 7 Set exceptionally high but achievable standards
- 8 Quality of work exceeds expectations on every occasion
- 9 Strive to produce the very best work at all times
- 10 Complete tasks thoroughly and exceed expectations

# Phrases for not meeting expectations

- 1 Deliver inconsistent quality of work repetitively

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- 2 Fail to respond to colleagues' requests or customer complaints

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- 3 Demonstrate no commitment to quality of work

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- 4 Submit below-average work

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- 5 Tasks are poorly thought out and often full of mistakes

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- 6 Disobey the company's procedures and policies

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- 7 Expect others to complete unfinished tasks

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- 8 Leave work before all agreed tasks are completed

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- 9 Fail to follow pre-established processes

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- 10 Lack of desire to improve

# 6. Adaptability

Employees need to know when and how to pivot their priorities when needed. This is an important skill as things might not always go as planned. These phrases will be useful when evaluating your employee's adaptability:

## Phrases for meeting expectations

- 1 Remain composed in the face of an emergency or priority change
- 2 Willing to adapt to changes in assignments
- 3 Open to collaborating with other departments when needed
- 4 Help team members remain calm when a priority change occurs
- 5 Open to feedback from people in other departments when resolving issues
- 6 Accept process changes that could lead to an increase in productivity
- 7 Easily adjust priorities, activities, and attitudes to meet new deadlines and information to achieve objectives
- 8 Quick response to a sudden change in information and draw conclusions from it
- 9 Quick bounce back from setbacks, and maintain an optimistic attitude
- 10 Demonstrate initiative and independence when making suggestions to improve the effectiveness of a changing environment

## Phrases for not meeting expectations

- 1 Has difficulties remaining composed when priorities change

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- 2 Demonstrate a lack of openness to a change in procedure

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- 3 Avoid collaborating with colleagues and teammates

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- 4 Has difficulty coming up with solutions when there is a problem

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- 5 Avoids feedback from other departments when solving problems

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- 6 Show reluctance when asked to lead others in the same office or department

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- 7 Always late in executing a new plan or project and neglects tasks that need priority

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- 8 Hardly attends training, workshops, or any other research based activity meant to increase self-efficiency

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- 9 Unable to multitask. Feels overwhelmed when juggling several tasks or when under pressure

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- 10 Adapt well to small changes, but finds it difficult to deal with larger issues that affect the whole office or department



# 7. Leadership

Great manager fosters leadership within their team, encouraging employees to take the initiative, initiate projects, ask questions, and mentor others. Use the following phrases to evaluate employee's leadership capabilities:

## Phrases for meeting expectations

- 1 Sets a positive example for other employees
- 2 While spearheading a project, was quick to take responsibility for the team's mistakes
- 3 Well-respected by their colleagues
- 4 Provide constructive feedback to colleagues regularly and shows appreciation for their work and effort
- 5 Demonstrate the ability to remain calm under pressure
- 6 Bring people together to form a high-performing team
- 7 Organize tasks and projects to further enhance teamwork among members
- 8 Guide and support people to achieve their goals
- 9 Maintain open communication channels
- 10 Develop and utilize individual's unique talents and strengths

# Phrases for not meeting expectations

- 1 Struggles to work with people of different personalities

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- 2 Show no appreciation for other team members' work

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- 3 Tend to avoid taking responsibility for the actions of others

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- 4 Provide little support to help team members to succeed

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- 5 Demonstrate the tendency to micromanage when in charge of projects

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- 6 Does not listen to other team member's ideas and feedback

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- 7 Communicate aggressively and through reprimands

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- 8 Often unavailable for long period of time during working hours

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- 9 Sow discord and disharmony within previous well-functioning teams

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- 10 Offer no appreciation, recognition or rewards for a job well done by the team

# 8. Initiative

Taking initiative is an essential trait of high-performing people. Employees who take initiative stand out from their peers because of their willingness to act without being asked to. Here are some phrases to refer to when evaluating and discussing employee's initiative levels.

## Phrases for meeting expectations

- 1 Proactively seek out new tasks to work on
- 2 Work well without any supervision
- 3 Able to set goals, prioritize and accomplish them
- 4 Adopt a flexible approach to adapt to changing priorities
- 5 Find new and creative ways to overcome challenges
- 6 Take pride in completing projects on time
- 7 Always on the lookout for new ways to improve and add value
- 8 Always suggest new ideas and approaches
- 9 Willing to embrace new opportunities and take on additional tasks
- 10 Communicate with all stakeholders to ensure the job gets done

# Phrases for not meeting expectations

- 1 Overpromise on capabilities during the job interview
- 2 Unable to complete the task without constant supervision
- 3 Resistance to learning new skills or improving existing ones
- 4 Lack of motivation to take on new challenges
- 5 Rarely add value to projects beyond the basics of what is required
- 6 Unable to cope under pressure or adjust to new or unfamiliar tasks or circumstances
- 7 Shy away from making decisions
- 8 Fail to come up with new ideas or solutions to problems
- 9 Has difficulty setting priorities
- 10 Often start the project without thorough upfront planning

# 9. Coaching and development

To guide employees along their desired career paths, you'll have to cater to their abilities. Start with specific ways to measure how they've excelled or shown a lack of improvement. Here are some phrases to refer to when evaluating your employee's work:

## Phrases for meeting expectations

- 1 Is open to constructive criticism from all sources
- 2 Implement feedback and criticism
- 3 Has shown improvement since the last performance appraisal
- 4 Demonstrate a desire to learn new skills
- 5 Teammates have reported marked improvement in the quality of work
- 6 Open to optimizing processes for the benefit of the team
- 7 Possess high emotional intelligence and the ability to relate to everyone on the team
- 8 Seek clarification when uncertain on how to complete a task
- 9 Take responsibility for own mistakes and failures
- 10 Possesses strong questioning skills

## Phrases for not meeting expectations

- 1 Avoid criticism and choose to ignore feedback
- 2 Avoid implementing suggestions from others
- 3 Show a lack of interest in learning new skills
- 4 Teammates have reported a lack of improvement in work quality
- 5 Has shown little improvement since the last review
- 6 Avoid improving processes when the need arises
- 7 Show resistance to change
- 8 Get too emotionally attached to the learner's goals and gets disappointed when unable to achieve these goals
- 9 Seek individual coaching only when an area of weakness has been identified by someone else
- 10 Demonstrate a lack of awareness regarding his or her deficiencies as a team member or employee

# 9. Interpersonal skills and teamwork

Great manager fosters leadership within their team, encouraging employees to take the initiative, initiate projects, ask questions, and mentor others. Use the following phrases to evaluate employee's leadership capabilities:

## Phrases for meeting expectations

- 1 Shows a strong desire to collaborate with other team members
- 2 Encourage each team member to share their ideas in meetings
- 3 Willingness to share expertise with colleagues to improve their performance
- 4 Demonstrate the ability to delegate tasks fairly
- 5 Share ideas on how to improve the inclusiveness of the workplace culture
- 6 A proven team player
- 7 Respect the working styles and boundaries of colleagues
- 8 Demonstrate good interpersonal skills
- 9 Hold a positive influence on all team members and leads by example, improving the team's morale
- 10 Solve team conflicts in a calm and mature manner

# Phrases for not meeting expectations

- 1 Make other team members feel outcasted

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- 2 Does not delegate tasks

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- 3 Quiet and not willing to share ideas and knowledge during team meetings

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- 4 Often reluctant to provide feedback to other colleagues, even when asked

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- 5 Demonstrate the inability to accept constructive criticism

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- 6 Demonstrate poor attitude towards teamwork

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- 7 Lack respect for colleagues working styles and boundaries

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- 8 Late for team meetings

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- 9 Publicly criticize team members and make them look bad

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- 10 Unwilling to help if needed, which impacts the performance of the entire team



# Improve employee performance reviews with Omni

We've compiled these 200 phrases to get you started — go ahead and customize them to suit your company, team, and employee needs. When it's time to conduct performance reviews, you don't have to start from scratch or get bogged down in paperwork and multiple tools. Even if your company doesn't have a refined review process yet, Omni HR has the resources and tools to help you.



Check out Omni's **performance reviews** to save time, maximize employee development, and scale your performance review efforts all in one place.





# Performance review questions

For individuals, managers & peers

Template



# Self-evaluation template



The self-evaluation segment of the performance review is an opportunity to share your own perspective on your performance, actions, and decision-making.

Employees perform self-evaluations by reflecting on their projects and sharing what they want to accomplish at the company and in their careers. This is your chance to advocate for yourself.

Before you get started, take the time to reflect on your wins, challenges, needs, and goals before getting started. Below are some self-evaluation review questions.

- 1 What aspects of your job do you enjoy the most? What aspects do you enjoy the least?
- 2 Ensure questions are clarified before taking actions that impact outcomes
- 3 Able to articulate complex and technical concepts in plain language
- 4 Keep all stakeholders up to speed on the project's progress and delivery
- 5 Take and share meeting notes and progress updates regularly
- 6 Ask questions and share information with the team
- 7 Encourage every member of the team to share their ideas in meetings
- 8 Is willing to share expertise with colleagues to improve their performance
- 9 Demonstrate the ability to delegate tasks fairly
- 10 Share ideas on how to improve the inclusiveness in the workplace

# Manager template

On a direct report evaluation form, managers have an opportunity to discuss competencies, communicate expectations, and course-correct when an employee is headed down the wrong path.

## Sample direct report evaluation questions include:

- 1 What is an area where you've seen this person excel in the last X months?
- 2 What's an area in which you'd like to see this person improve? Please provide examples from the last X months.
- 3 How has this person meet their performance goals in the last X months?
- 4 How well did this person manage their workload in the last X months?
- 5 How well did this person adapt to changing priorities in the last X months?
- 6 How well did this person communicate with others in the last X months?
- 7 What are some areas of focus that could benefit this person?
- 8 What role does this person have on the team and what impact they have had?
- 9 What are some positive interactions you have noticed between this person and others?
- 10 What is the company value that this person most exemplified in the last X months?

# Peers template

Peer feedback is a valuable part of 360 performance review process, as it provides a safe space for colleagues to highlight the strengths and areas of opportunity in an employee's performance over a certain period of time, and also reflect on successes and challenges in past projects they have worked on together. This gives managers valuable context as to how their reports collaborate with others.

## Below are some sample peer review questions:

- 1 Does this employee effectively communicate with others or with you? What impact did that have?
- 2 How effective of a leader is this person, either through direct management or influence?
- 3 Does this person find creative solutions, and own the solution to problems? Are they proactive or reactive?
- 4 How would you rate the quality of the employee's work?
- 5 How has this person's work impacted your ability to deliver on your goals?
- 6 Does this person follow through on goals and expectations?
- 7 To what extent and how does this person involve the right stakeholders in their work?
- 8 How well has this person set and met deadlines over the last X months?
- 9 What have been this person's successes and challenges over the last X months?
- 10 If you could give this person one piece of constructive advice to make them more effective in their role, what would you say?

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# Performance review email templates



# 1. Email announcement to start performance reviews

**Subject:** It's time for performance reviews!

**Body:** Hi {Employee First Name},

I'm excited to share that we're beginning the performance review process on {date}. This is an important time to review and assess the progress you've made within your role, and measure your contributions to the company's mission over this review period.

All full-time employees who joined us before {date} are required to partake in the self-evaluation process before their respective managers evaluate them.

We've provided reference materials here to give you an idea of what's expected.

**Important deadlines:**

- {Date}: Employees self-evaluations are due. All eligible employees should have completed and submitted their self-evaluation performance review to their managers.
- {Date}: Peer reviews are due.
- {Date}: Managers review of direct report's self-evaluation due.
- {Date}: HR team's evaluation of all completed reviews due.

Remember, it is important that you complete and submit your self-evaluation on time. A reminder will be sent at the deadlines approach if you have not submitted your review.

# 1. Email announcement cont.

We're here to help! Please reach out with any questions or concerns.

Happy reviewing!  
{Your signature}

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The complete performance review email templates



## 2. Email with tips for successful selfevaluations

**Subject:** DEADLINE REMINDER: Only [X] days left to submit

**Body:** Hi {Employee First Name},

In preparation for your upcoming performance review self-evaluation, we've compiled a list of tips and resources to help you with the process. Feel free to reference the following for inspiration, direction, and instructions on conducting a successful self-evaluation.

- Take time to reflect on your entire year, not just the most recent quarter— If you recorded your accomplishments as they happened (and if you didn't, pro-tip to start now!), review your log before beginning your review.
- Be specific and use numbers to illustrate your impact— For example, it is better to write "I grew our social media following by 2k followers in 3 months" than writing "I improved our social media channels."
- Reference your job description to tie in company objectives and get guidance on what to highlight.
- For more tips and examples of self-evaluation questions along with their answers, [click here](#)

You've got this!

{Your signature}

Don't forget, your deadline to submit the completed self-evaluation forms is {date}. As always, please reach out with any questions.

### 3. Email reminder of self-evaluation deadline

**Subject:** DEADLINE REMINDER: Only [X] days left to submit your self-evaluation

**Body:** Hi {Employee First Name},

The performance review process has officially begun and we hope you found our tips helpful in completing your self evaluation.

This is a friendly reminder that you have [X] days until {date} to submit your completed evaluation to your manager.

Being proactive in your review will allow you time to reflect and add any additional accomplishments before your due date. Don't leave this for later!

Please let me know if you have any questions.

You've got this!  
{Your signature}

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## 4. Email reminder of self-evaluation deadline

**Subject:** It's time for your peer review!

**Body:** Hi {Employee First Name},

This is a notice to inform you that {peer's name}'s performance review is ready for your input. Peer reviews are an essential tool in measuring employee performance and impact.

To access the performance review, click here {include link to Peer review} and provide your feedback in the fields available.

Thank you for your participation,  
{Your signature}

Friendly reminder that this is due back on {date}. Please let me know if you have any questions.

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## 5. Manager review readiness notice

**Subject:** It's time to review your direct report.

**Body:** Hi {Manager First Name},

{Direct report's first and last name} has completed their self-evaluation, and it is time for you to review their performance as their manager. For guidance on how feedback best practices, refer to this performance review template to inform your process.

Please schedule an appointment with the employees individually to discuss their self-evaluation performance review and meet with their team members to evaluate the employee in review directly.

If you have any questions or need additional support, please reach out to me.

Kind regards,  
{Your signature}

This is a friendly reminder that you have [x] days until {date} to review their self-evaluation.

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## 6. Review past-due notice

**Subject:** Your review is past-due

**Body:** Hi {Employee or manager first name},

This is a notice to inform you that your {type of review} is past due by [X] days. As previously informed, the due date for such review was {date}. We request that you complete and submit your review within 24 hours.

If you need additional support, or for some reason are unable to complete your review, please reach out to us immediately.

If you have any questions or need additional support, please reach out to me.

It is important that reviews are completed in a timely manner to support employee growth and keep business objectives on track. We appreciate your cooperation.

Thank you,  
{Your signature}

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## 7. Email announcing performance results

**Subject:** Your performance rating is complete

**Body:** Hi {employee first name},

This email is to notify you that your performance review cycle has been completed. Your manager and HR have reviewed your selfevaluation and we're pleased to inform you of your results.

{Include employee performance ratings}

You will receive an invitation from your manager to meet in the coming weeks to discuss your performance review. If you have any questions or concerns, please prepare them to discuss during this meeting.

Thank you for your participation,  
{Your signature}

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## 8. Email announcing salary increase

**Subject:** Notice of salary change

**Body:** Hi {employee first name},

Congratulations on your recent performance review!

As you were previously informed, your performance review came back with a rating of {employee rating}. We are so appreciative of your contributions at {company name}, you should be proud of your great work.

As a result, we'd like to inform you of an increased salary. Effective {date} your salary will be increased from {previous salary} to {new salary}. You will see this change in your paycheck for {pay period}.

Please let me know if you have any questions.

Congratulations!,  
{Your signature}

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## 9. Email announcing promotion

**Subject:** Notice of salary change

**Body:** Hi {employee first name},

Congratulations on your recent performance review!

As you were previously informed, your performance review came back with a rating of {employee rating}. We are so appreciative of your contributions at {company name}, you should be proud of your great work.

As a result, we'd like to inform you of your promotion to {new role}. Effective {date} your title will be {new title}. You'll receive an invitation from your manager to discuss this in further detail shortly.

Please let me know if you have any questions.

Congratulations!,  
{Your signature}

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# 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!

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

 [Book A Demo](#)



The ultimate performance review template

# Employee performance review template

## Employee information

Employee name	Job title
Manager name	Review period

## Core values and objectives

Performance category	Rating	Comments & examples
<b>Quality of Work</b> Work is completed accurate (few or no errors), efficiently and within deadlines with minimal supervision	<input type="checkbox"/> Exceeds expectations <input type="checkbox"/> Meets expectations <input type="checkbox"/> Needs improvement <input type="checkbox"/> 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.
<b>Leadership</b> Effectively and efficiently runs a team while giving clear guidance.	<input type="checkbox"/> Exceeds expectations <input type="checkbox"/> Meets expectations <input type="checkbox"/> Needs improvement <input type="checkbox"/> 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.

<p><b>Reliability/ Dependability</b></p> <p>Consistently performs at a high level; manages time and workload effectively to meet responsibilities</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Exceeds expectations</li> <li><input type="checkbox"/> Meets expectations</li> <li><input type="checkbox"/> Needs improvement</li> <li><input type="checkbox"/> Unacceptable</li> </ul>	<p>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.</p>
<p><b>Communication Skills</b></p> <p>Written and oral communications are clear, organized and effective; listens to and comprehends peers</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Exceeds expectations</li> <li><input type="checkbox"/> Meets expectations</li> <li><input type="checkbox"/> Needs improvement</li> <li><input type="checkbox"/> Unacceptable</li> </ul>	<p>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.</p>
<p><b>Judgement &amp; Decision- Making</b></p> <p>Makes thoughtful, well-reasoned decisions; exercises good judgment, resourcefulness and creativity in problem-solving</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Exceeds expectations</li> <li><input type="checkbox"/> Meets expectations</li> <li><input type="checkbox"/> Needs improvement</li> <li><input type="checkbox"/> Unacceptable</li> </ul>	<p>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.</p>
<p><b>Initiative &amp; Flexibility</b></p> <p>Demonstrates initiative, often seeking out additional responsibility; identifies problems and solutions; thrives on new challenges and adjusts to unexpected changes</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Exceeds expectations</li> <li><input type="checkbox"/> Meets expectations</li> <li><input type="checkbox"/> Needs improvement</li> <li><input type="checkbox"/> Unacceptable</li> </ul>	<p>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.</p>
<p><b>Cooperation &amp; Teamwork</b></p> <p>Respectful of colleagues when working with others and makes valuable contributions to help the group achieve goals</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Exceeds expectations</li> <li><input type="checkbox"/> Meets expectations</li> <li><input type="checkbox"/> Needs improvement</li> <li><input type="checkbox"/> Unacceptable</li> </ul>	<p>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.</p>

## Job-specific performance criteria

Performance category	Rating	Comments & examples
<b>Knowledge of Position</b> Possesses required skills, knowledge, and abilities to competently perform the job	<input type="checkbox"/> Exceeds expectations <input type="checkbox"/> Meets expectations <input type="checkbox"/> Needs improvement <input type="checkbox"/> 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.
<b>Training &amp; Development</b> Continually seeks ways to strengthen performance and regularly monitors new developments in field of work	<input type="checkbox"/> Exceeds expectations <input type="checkbox"/> Meets expectations <input type="checkbox"/> Needs improvement <input type="checkbox"/> 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:

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

## Overall Rating

### Exceeds Expectations

Employee consistently performs at a high level that exceeds expectations

### Meets Expectations

Employee satisfies all essential job requirements; may exceed expectations periodically; demonstrates likelihood of eventually exceeding expectations

### Needs Improvement

Employee consistently performs below required standards/expectations for the position; training or other action is necessary to correct performance

### Unacceptable

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

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Date

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Reviewer Signature:

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Date

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# Employee Self-Evaluation Performance Review Template

## Employee information

Employee name	Job title
Manager name	Review period

## Core values and objectives

Quality of Work	How have I excelled in this category?	Where can I improve in this category?
<p><b>Quality of Work</b></p> <p>My work is completed accurate (few or no errors), efficiently and within deadlines with minimal supervision</p>	<p><b>How have I excelled in this category?</b></p> <p>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.</p>	<p><b>Where can I improve in this category?</b></p> <p>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.</p>

### **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 effective; 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.



### **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.

## 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.

## Acknowledgment

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

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Reviewer Signature:

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Date

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Date

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About Omni HR

# All-in-one HR management software

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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people operations**

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