

Performance Review: **NAME**

Date:

Link to relevant documentation:

*This performance review template is intended to be used at all half-year reviews, starting at 6 months (EG: 6 months, 1 year, 1.5 year, 2 year, etc.) Compensation changes are only made at 1-year interval reviews.*

*To use this template: Copy the text below, add a new page in your company's specific documentation space, and set permissions so that only the employee, their manager, and HR can view. If using G-suite for managing docs, you can File > Make a Copy and rename.*

1. Describe your current role at COMPANY NAME.
  - a. *Why we ask this: Can they sum up their ownership in a sentence or two? Do they describe what they own, or the tasks they do? This helps you understand how close or far away they are from leveling up beyond task-completion to project ownership.*
2. Key accomplishments
  - a. Key achievement 1: OKR-based
    - i. Steps I took to achieve my goals:
    - ii. Roadblocks
    - iii. Successes
  - b. Key achievement 2: Personal goal-based
    - i. Steps I took to achieve my goals:
    - ii. Roadblocks
    - iii. Successes
  - c. Any new personal growth goals?
    - i. What are you going to do to achieve them?
3. Feedback (employee + manager shares)
  - a. What are you proud of?
  - b. Where do you see opportunities for leveling up?
    - i. *Why we ask this: Employees are keen to where they fall short, In fact, they probably dread being reminded of it. Ask them what they want to improve, and you likely won't have to deliver any constructive*

*feedback on your own because they'll do it for you. Then, work on those improvements throughout the year together, and the employee will feel much more ownership over it because it came from them, not you.*

- c. What have you enjoyed working on?
- d. Are there any aspects of work that you are not enjoying?
- 4. What are your career goals?
  - a. Are your tasks and projects aligning with your career goals?
  - b. Is there anything you are working on that is not aligning with your goals?
    - i. What can we change or provide to help you on that path?
- 5. What are your life goals?
  - a. **Why we ask this:** *You'd be surprised what you'll learn about your employee and their goals. Make sure you know you want them to be successful in work and life, too.*

Employee signoff: \_\_\_\_\_ DATE

Manager signoff: \_\_\_\_\_ DATE