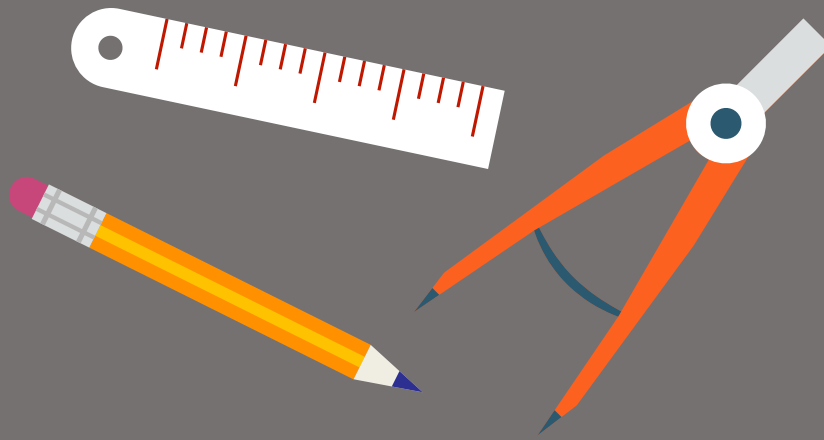


7 Sample Performance Reviews

To Help You
Write Yours



PRACTICAL TOOLS

7 Sample Performance Reviews To Help You Write Yours



These seven sample performance reviews offer actual language you can use when assessing employee performance. The true value of these seven examples is that each contains the kind of language that helps a manager set the stage to improve an employee's performance in the coming months.

Remember: These are not one-size-fits-all documents because the needs of each individual employee are different.

- 1. Review of a Very Promising Junior EmployeePg. 3
- 2. Review of a Strong Employee Seeking a PromotionPg. 6
- 3. Positive Review of a Middle-Level ManagerPg. 9
- 4. Tough Feedback to a Newer EmployeePg. 13
- 5. Tough Feedback to an Experienced EmployeePg. 16
- 6. Review of Average Employee Who Only Wants to Do
the Job They're Doing and Nothing MorePg. 19
- 7. Review of an Average Performer Who Thinks He or She
Is an A Player – But Isn't.Pg. 22

Review of a Very Promising Junior Employee

(Given at six months, this review is designed to push an employee to stretch self)

TO:

FROM:

SUBJECT: Performance Review

DATE:

Here's a summary of what we discussed at the performance review last XXXXX after your first six months here:

Strong points:

- Exceptional skills: Be specific. For example: Excellent eye for detail; Top-notch analytical skills; Impressive phone skills, etc.
- Good skills: Be specific. For example: Good with new customers; Good with understanding data, etc.
- Valuable participation in meetings.
- Sense of ownership for your job.

Emerging skills to build on:

Time management: You know that if you are to take over full responsibility for your area, you'll have to become more productive. The best way to do that is by developing the mental discipline to force yourself to determine what the focus of each day should be. Once you've mastered the skill of deciding priorities, you'll be best positioned to identify the tasks to get you there.

Attention to detail: You've made good progress to control some excess sloppiness in your own work, which had the unfortunate effect of making your work appear of less quality than it was. You still have a way to go. You know what you have to do: Concentrate harder on how you present information to other departments and look over your own work one more time with a critical eye.

Continuous learning: You're impatient to take on more responsibility faster, but there are good and bad sides to impatience. Ambition is fine, but your present priority is to get the most learning out of every phase of the training process.

Concepts of which your understanding is still in the beginning stages:

Packaging and "selling" the essential information: You have not been able to consistently develop ways to lure more potential buyers. Watch how the experts (your peers) do it and emulate them.

Core values: One of our core values is collegiality and freely giving of ourselves to others to help them improve their performance without regard for rank or hierarchy. We don't hide our talents. You seem to be largely unaware that you make the impression on some people of being somewhat introverted and shy. But you have a lot to offer to others. Don't be afraid to reach out, make contact with and extend a helping hand to others.

Customer focus: You have embraced our long-term strategy to effectively create customer loyalty. You've recognized it is a step-by-step program and have approached it in a manner that will best position you to take customer focus to the next level.

General assessment:

You are well on the way to meeting and in some areas exceeding

the expectations we had of you as to where you would be after one full year with us. We have every reason to believe that after your first year, you will be able to function as a reliable employee in an important position, producing quality results with as little supervision as possible. There are other things connected with being a valuable employee: liaison with the marketing department, public speaking skills to enthuse others, etc. (Be specific) But if you dedicate yourself to a solid learning process, your long-term goal of eventually becoming a manager and training others in our way of producing business results also seems achievable at this point. You will realize that you still have much to learn on principles of management, leadership skills, the big-picture business executive outlook, principles of marketing, etc. You'd do well to concentrate for the moment on becoming the best at what you currently do. That will give you the confidence that will serve as the building block for future success in all other areas.

We'll do everything we can to help you achieve it.

Review of a Strong Employee Seeking a Promotion

TO:

FROM:

SUBJECT: Performance Review

DATE:

To memorialize last week's performance review, here's a summary of what we discussed:

Strong points:

- Sense of ownership of your work
- Self-starter mentality, initiative for coming up with ideas
- Developmental activities, both in formal and informal settings with selected employees
- Keen awareness of and adherence to processes/procedures
- Strong core-area skills (Be specific.)

Emerging skills you need to build on:

Keeping pace with technological advances: You have mastered execution of most specific aspects of your work, but yours is a field that is always changing and updating itself. It's incumbent on successful employees to stay abreast of these changes to keep themselves updated and ahead of the technological curve.

Making yourself results-driven: You take to heart the task of making your work the best it can be, but I don't yet get a keen sense you have etched in your mind it's all for a business purpose (put specifics here). Make those numbers your personal goal and link your tasks more closely to business results.

Building and maintaining good relationships: Good relationships are the heart and soul of future business arrangements. These strategic relationships need to be developed and maintained on a regular basis.

Areas that still need some work:

Meeting deadlines: Deadlines have turned out to be your biggest challenge. You should be able to organize customer needs and deliver service consistently, not just now and again. Find ways to maintain that momentum!

Action steps:

- Become better at thinking ahead instead of just instinctively acting.
- Activate the left "analytical" part of brain, not just right creative side.
- Read and emulate success stories of others.

Knowledge of and feel for general management and business principles: You have started to read business and management books, but a sophisticated level of understanding of business principles does not yet consistently show in your work.

Action steps:

- Continue reading management and business books.
- Discuss what you've learned, show it in "upward communication" reports.

General assessment:

In many areas you have exceeded our expectations, such as in the remarkable rapport you have established with your co-workers, which is essential to our business success and a model for other employees here. Still, you're not quite working as independently as possible after one full year. Your own insights as to how you should attempt to get there are right on the mark (applying clear intellectual processes to the structure of your work).

Now it's time to do it!

Your eventual goals of assuming more responsibility, and generally as a leader in the department, are achievable with hard work. Managing in a results-driven business is much more than having a nice touch with certain people. It involves first mastering success skills yourself, then showing others by example, taking on initiatives beyond your immediate area of responsibility and finally articulating the company vision through all your interactions. You're definitely capable of getting there and we'll do everything we can to help you.

Positive Review of a Middle-Level Manager

TO:

FROM:

SUBJECT: Performance Review

DATE:

On the occasion of your most recent employment anniversary, here's a summary of our performance review discussions:

Strong points:

- Good manager – with you on the job, the task gets done, on time and always more than adequately.
- Strong results orientation – you buy into our measurements system and get buy-in from others.
- In the past year you greatly improved your skills in the performance review area and in administering compensation policies aimed at what's best long-term for the company and our people.
- Excellent new recruit trainer – people learn our core editorial values from you and learn them well.
- You're valuable to me because you help me manage resource issues for the entire department.
- You show strong commitment to fostering productive working relations with other departments.

- You're willing to help other areas of the company as an "internal consultant" to cooperate with our quest for further growth in non-traditional areas.

Your areas of priority:

People development: This is perhaps the most important thing we can do as managers for the long-term well-being of the company and I think you've made remarkable strides in this area during the past year. You've had successes in developing middle-level managers and effectively delegating responsibilities to them; you've built up a solid track record as an excellent trainer in the basics for new recruits; you've managed to create staff stability in your group, while at the same time managing the economic expectations of some of our people and convincingly communicating the needs for and the wisdom of our compensation policy. It's been a happy story for me to see a transformation to a situation where people are actually asking me – begging me – to make you their supervisor. We can never rest on our laurels in this area, and new people will bring new challenges. Indeed, the same people need to be constantly motivated with new challenges, too, but it's been a pleasure for me to see you grow in this area.

Influencing results: It's been a challenging year for all of us in our drive to exceed business results from last year. We have rowed upstream in a soft economy. In the end, results were not acceptable this year in our key areas. We didn't anticipate how deeply external circumstances would affect us, and when we did react, it was too little, too late. We can't look for too many excuses. It doesn't do any good to argue (even if there's a grain of truth in it) that results would have been worse if it hadn't been for our intervention. If we want growth for the company and its people, we can't be satisfied until we find ways to advance the ball.

Of late, you've tried to be more creative with different approaches (and encouraged your group to do the same), as we urged in last year's review. Not all those efforts will pan out immediately. Don't be discouraged our customers don't instantly love every new thing you try. And concentrate on high-impact business efforts and don't get too distracted by "packaging" sideshows. We believe quality is king in our business and that's where efforts should be focused.

Job enlargement, extending your influence beyond your group:

I know you're ambitious in the good sense of the word and you want to continue to move up with the company. Don't stare yourself blind on the fact that you've had the same title for the past three years and haven't had another specific promotion. You have become more valuable in the management of the department and to the company as a whole because of the expertise that you continue to acquire. Those contributions have been noted and are appreciated. You make more frequent and valuable contributions in group meetings and are showing real leadership in the so-called Values issues, which are the most important. And you have become a valuable internal consultant to new hires. Our perspective is that you are enlarging your role at the company and it's important to keep that perspective.

General assessment:

As a department, we face three great challenges during the coming year and you will play an important part in all three of them:

First, you will see us as a company display all sorts of non-traditional activities in search of further growth. It's up to us as managers not to show any jealousy toward those new ventures and to do what we can to support them—even if we don't get directly rewarded for our involvement. We will all share in the success if we do it right.

Second and perhaps most importantly, we have to reverse the downward trend in our own business sector and we are looking to your group to show us the way how to do that even in the face of adverse circumstances. It'll take a combination of hard work and getting back to basics with what has worked for us in the past, as well as a substantial dose of creativity and adaptability. It's up to us to show real leadership in not being satisfied with any part of the business going backward. We aren't satisfied until we see growth and advancement.

Thirdly and of almost equal importance is your active collaboration in the important staff renewal we're in the middle of at the moment. We are in the process of setting and enforcing high standards in productivity and quality. We have brought on and will continue to bring on a number of new people of varying levels of experience and we all need to help integrate them as fast as possible and cheer their advances, without any false sense of insecurity. The more smart, good, strong people we have at the upper levels of the department, the better it'll make us all. I feel sure the next 12 months will be exciting for all of us and I'm confident there will be a major role for you to play.

Tough Feedback to a Newer Employee

TO:

FROM:

SUBJECT: Performance Review

DATE:

Here's a summary of what we discussed:

Strengths:

- Organizational skills and time management
- Attitude and work ethic
- Initiative – you're anxious to take on more than what's required and expected
- Clear.

Areas to work on:

Flexibility: You're strong-willed and you believe in yourself. Strong convictions have given you a confidence base that served you well in learning a difficult field and making the progress to date, which is considerable. There is a flip side to strong convictions, however. If they aren't tempered by flexibility, it can result in rigidity. There is no room for rigidity in our culture. We're a flexible company with few rules – the only rule is to try to serve our customers the best possible way. You've exhibited something bordering on rigidity in several ways. On a fairly minor point,

you're sometimes hesitant to start over when that's exactly what is needed. We don't believe ironclad rules on who does what make sense from the point of view of serving customers.

We also admire your ambition to be named a Group Leader in short order, but it worries us that you apparently think that you're just about there. You have already told us that we will have to agree to disagree on this point, but we still urge you to try to understand – and at least respect – management's point of view. As long as the managerial hand-holding must continue to get your projects into market shape, you have to realize that any promotion is premature. Your focus at present should be on continuing to learn your field, or, in terms of a sports analogy, continuing to chart plays from the bench, understanding why something worked and why something else didn't, instead of tugging at the sleeves of the coach saying, "Put me in coach, I can do it." We hold no one back unfairly. We have a crying need for good people. When you're ready for more responsibility, we won't hesitate one moment to confer it.

Developing expertise: You learned a lot about your products this past year, but you have still more to learn. You may now understand the market needs, but you don't always find the best ways to fill them.

Be relentless in your efforts to find out what any piece of info really means to our customers, make the extra telephone call to regulators, consultants or other sources. Learn how business works in general and how business principles apply to your field. Ask in-house experts. Set up a site visit. Go to conferences to rub shoulders with our people. Above all, seize every opportunity to talk to customers on the phone. We'll help you in every way we can to scale the learning curve faster.

General assessment:

You came to us with little practical experience. We hired you mainly on the raw desire and determination we saw in you. In view of that, you have exceeded our expectations during your first year here. Your eagerness to learn a difficult area has pleasantly surprised us. You've made outstanding progress and you've shown yourself to be reliable. That's made you an important part of the team that has shown improvements in the business results. You can be proud of what you have achieved in your first year, but that pride should be tempered by a healthy dose of humility, the realization we all have about how much more there is to learn.

This is a generally positive review that hopefully provides the road map for your journey to scale the next level at our company. Your intermediate goal is to (be specific here). Following this road map can get you there. Over the next few months, we think it's a good idea to open up another avenue of learning for you in an unrelated pub, so you'll be progressing on more than one track simultaneously. That's so you will be able to take advantage of the first realistic opportunity for substantial advancement that arises. We trust you'll tackle any new assignment with the same dedication you've shown so far.

Tough Feedback to an Experienced Employee

TO:

FROM:

SUBJECT: Performance Review

DATE:

Here's a summary of what we discussed:

Strengths:

- Your experience in the industry and with our company is an asset that can be put to good use.
- You have shown yourself over the years to be a capable professional.
- You had good success with (_____) and (_____) (specifically mentioning two projects or areas of performance in which the employee excelled or did better than expected).
- You have gained the respect of most of your colleagues, who see you as a veteran performer who has a lot to offer to them in the way of advice and mentoring.

Areas that need improvement:

(Some specific step, put in positive terms): (Here's where you point out something that went wrong that the employee was partly responsible for, why it was important, and what actions you expect the employee to take in the future to prevent any recurrences.

This should not be something new that the employee is hearing for the first time, but rather a brief summing up of something already discussed that the employee is aware of.)

A positive attitude: We have seen a disturbing trend in your approach to work here, and it needs to change. You do not embrace new initiatives. To the contrary, you seem bent on resisting them. In front of employees, even the newer, more impressionable employees, you make clear that you do not agree with new company initiatives. (Give specific examples) We need your experience to help guide us as we embark on new efforts. You can play a positive role improving the execution of our new plans because you know where the greatest dangers lie.

Greater effort: You seem to have stopped trying to exceed your goals. Sometimes it seems like you feel the company is now paying you for what you already know, and not for what you actually do. While you may know quite a lot, you are not applying that considerable knowledge enough to obtain positive results for the company and for yourself. No one gets a free pass on effort. We need to see you roll up your sleeves and show us you're really committed—and not just the minimum to get by.

General Assessment:

The past year was not a good year for you. As noted above, you are one of the more experienced employees in our department, and you have in the past proven yourself to be a capable performer, but you did not put that experience and those capabilities to good use during the past 12 months.

Your productivity and the quality of your work have declined. We need to start turning this around immediately. Employees are judged on attitude, effort and performance. While your performance may still be barely enough, your attitude and effort are headed toward being deficient. If the deterioration continues, disciplinary measures may well follow. But this is a situation that we believe can easily be remedied.

You have shown skepticism toward new initiatives. While a healthy dose of skepticism is helpful, you have to be careful that it does not degenerate into cynicism, which is destructive.

You have to realize that the good old days you seem to yearn for are gone forever. To survive and thrive, we must change. Not everything we try may be successful. We may take some wrong turns along the way and you can help us avoid some of them.

We need you on board and fully engaged as we go forward. We believe you still have it and can contribute a lot, for your own benefit as well as for the company's. Let me know how I can help you. I believe next year can be a great turnaround for you.

Review for Average Employee Who Only Wants to Do the Job They're Doing and Nothing More

TO:

FROM:

SUBJECT: Performance Review

DATE:

Here's a summary of what we discussed:

Strengths:

- You have proven to yourself and others that you can do this job.
- You're a steady performer not prone to making errors.
- You're dependable; when a task is entrusted to you, we can be confident that it will be completed with acceptable quality.
- You're well liked by your colleagues; you do not engage in disruptive behavior, and you have the potential to be a positive force for morale in the department.

Priorities for the coming year:

Increased productivity: We all have the feeling that on many occasions, you're just doing the minimum to get by and

that you're capable of doing so much more. We don't have minimum standards around here. That's a race to the bottom that would eventually spell the end of our company. We don't have "average" employees here – we only have people who meet our high expectations. We also believe your own potential is much better than "average." We need all our employees to step up and constantly meet and exceed our high expectations, and our standard is to strive for increased productivity and quality at all times – our customers demand it from us.

Becoming a player: You do your job and that's it – it often seems like you're just here to get a paycheck. I urge you to get more invested and engaged in the company and in your work specifically. You're smart; you're capable of making many useful observations about our work processes and pointing out possibilities for improvement. Your reward, far beyond any material possible improvements in compensation that you may aspire to, will be increased job satisfaction and the knowledge that you're a real player here. Your family and friends – as well as your coworkers and managers – will be proud of you.

General Assessment:

During the past 12 months, you have done everything possible to confirm our original assessment of you, that you have the intelligence and the experience to do this job adequately. You haven't failed to meet expectations, but it has proven exceedingly difficult to motivate you to go beyond meeting those minimum expectations.

We believe you're capable of more – and we hereby serve notice that we expect you to step up your contributions during the coming year.

People are motivated by different things. Some are motivated by money – you know that if you show us more, promotions and eventually increased compensation could be in your future. Some are not motivated by the possibility of greater financial rewards, but they seek the respect and admiration of family members, friends and coworkers. It'll be yours for the taking.

We urge and invite you to really join the team that is trying hard to make this a better place for the benefit of all of us.

I look forward to working with you on it and sharing more joys and achievements in the coming months!

Review of an Average Performer Who Thinks He or She is an “A” Player – But Isn’t

TO:

FROM:

SUBJECT: Performance Review

DATE:

Here’s a summary of what we discussed:

Strengths:

- Your enthusiasm for the job and for taking on more responsibility is admirable.
- You have a strong belief in your own talents and capabilities, which is the first ingredient necessary for success.
- You are meeting the high expectations we have set for your present position.
- You are ambitious and eager to move on to the next level, which is a positive.

Next steps:

Managing expectations: At times you are impatient for your next promotion. You seem to believe that you’ve learned all

there is to learn about your present position and that it's time to move up. While you've done an adequate job in your present position, I must point out to you that you haven't exactly knocked our socks off, either. You have to develop a greater sense of realism on where you stand at the moment. There is still room for improvement in your present position (spell out precisely how and where shortcomings may be remedied). Please do not get discouraged if that next promotion does not come immediately. Hold on to the dream, but develop some patience in the meantime.

Explore job enlargement: Even if that next promotion cannot be offered immediately, there are other ways to increase your contributions to the company and start taking on more management-type tasks. Volunteering for a stint on the recruiting committee, or on the safety committee, will help provide you with a higher-level perspective beyond the boundaries of your present job. You may also want to choose to participate in some of the company-sponsored volunteer activities to benefit nonprofit causes in our community. All such activities are good outlets for your considerable energy.

General Assessment:

Your situation is a perfect example of how every good quality, when taken to its ultimate extension, can easily become a bad quality.

For example, ambition is a good thing, but when it becomes all-consuming and blinding, it can become a negative because it can cloud your perspective on what has to be done now in your present position.

Self-confidence, likewise, is a good quality and helps most people perform well. But if it overshadows and shuts out all healthy self-assessments and one becomes blind to one's own faults and shortcomings, it will have become a big negative.