

Annual Performance Review Template

Questions for Non-Exempt Employees



Instructions for Employees and Managers

Please rate the employee's effectiveness in each of the categories below, drawing upon established performance metrics, a review of their work product and/or results, informal observation, and/or feedback from the employee's colleagues, clients, customers, and/or other key stakeholders.

Select a numerical rating and use the space provided to offer commentary and contextual insights to support and substantiate your rating, as well as to facilitate conversation when managers and employees meet to discuss this review.

We recommend rating employee performance using a 4-point scale for Annual Reviews.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Performance Level	Does Not Meet Expectations	Reliably Meets Expectations	Often Exceeds Expectations	Consistently Exceeds Expectations

Performance Levels, Defined

- 1. Does Not Meet Expectations:** Performance is ineffective and often misses the mark. Quantity and quality of work are inconsistent or insufficient and should be improved upon.
- 2. Reliably Meets Expectations:** Performance is effective and typically meets the expectations of the role. Quantity and quality of work are consistently good.
- 3. Often Exceeds Expectations:** Performance is excellent and outpaces the expectations of the role on an ongoing basis. Quantity and quality of work are impressive.
- 4. Consistently Exceeds Expectations:** Performance is exemplary and redefines the expectations of the role. Quality and quantity of work are exceptional. Best in class.

Section 1: Performance Indicators

Please rate the employee’s effectiveness in each of the categories below and provide commentary to support and substantiate your rating.

Attendance and Punctuality:

Employee arrives on time for all shifts and begins work promptly, schedules time off with advance notice as expected, notifies the appropriate parties when ill or injured, and abstains from excessive absenteeism.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Performance Level	Does Not Meet Expectations	Reliably Meets Expectations	Often Exceeds Expectations	Consistently Exceeds Expectations
Comments				

Communication:

Employee communicates in a manner that is consistent with expectations and conducive to being perceived positively and is mindful of the impact of their words, actions, and attitude on others, expresses ideas and conveys information in a clear, concise, and compelling fashion in conversation and in writing, and engages with colleagues and customers in a warm, welcoming, and inclusive fashion.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Performance Level	Does Not Meet Expectations	Reliably Meets Expectations	Often Exceeds Expectations	Consistently Exceeds Expectations
Comments				

Customer Focus:

Employee anticipates and responds to customer needs in a courteous and professional manner, actively seeks solutions, and strives to provide a positive customer experience, ensuring satisfaction and repeat business.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Performance Level	Does Not Meet Expectations	Reliably Meets Expectations	Often Exceeds Expectations	Consistently Exceeds Expectations
Comments				

Initiative:

Employee recognizes and acts upon opportunities for improvement in the workplace and behaves proactively and in a self-directed fashion without supervision.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Performance Level	Does Not Meet Expectations	Reliably Meets Expectations	Often Exceeds Expectations	Consistently Exceeds Expectations
Comments				

Job Knowledge:

Employee is knowledgeable of the methods, materials, skills, and techniques of effective performance and applies each in a resourceful and practical manner and understands the importance of their position within the company and the impact of their efforts on colleagues and customers.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Performance Level	Does Not Meet Expectations	Reliably Meets Expectations	Often Exceeds Expectations	Consistently Exceeds Expectations
Comments				

Productivity:

Employee works consistently and efficiently, avoiding distractions and dead ends in order to complete tasks at a sufficient pace and volume and completes assignments and tasks by designated deadlines.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Performance Level	Does Not Meet Expectations	Reliably Meets Expectations	Often Exceeds Expectations	Consistently Exceeds Expectations
Comments				

Quality:

Employee adheres to company policies, practices, procedures, and performance standards, is diligent and detail-oriented, completing tasks and/or producing work that is accurate, complete, neat, and thorough, takes responsibility for mistakes when necessary, and adjusts efforts accordingly.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Performance Level	Does Not Meet Expectations	Reliably Meets Expectations	Often Exceeds Expectations	Consistently Exceeds Expectations
Comments				

Teamwork:

Employee engages with peers and partners in a cooperative and cohesive fashion, works in tandem with others to achieve mutual goals, pulls their own weight to maximize their contribution to the success of the team, and acknowledges and appreciates the efforts and impact of their coworkers.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Performance Level	Does Not Meet Expectations	Reliably Meets Expectations	Often Exceeds Expectations	Consistently Exceeds Expectations
Comments				

Section 2: Results and Impact

Please respond to the following questions regarding the employee’s results over the last 12 months and provide commentary and examples to support and substantiate your rating.

1. How would you evaluate the employee’s effectiveness in their role in the course of the review period? What are the most important or impressive skills and strengths the employee brings to their role?

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
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Comments				

2. How would you evaluate the employee’s engagement level in the course of the review period, including the extent to which they align with and add to company culture? Which core value does the employee best exemplify?

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
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Comments				

3. How would you evaluate the employee’s impact and contributions in the course of the review period? What are the employee’s most significant accomplishments and/or proudest achievements?

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
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4. How would you evaluate the employee's commitment to continuous improvement and/or professional development in the course of the review period? What new knowledge, skills, and/or abilities has the employee pursued or improved upon?

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
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Section 3: Focus Going Forward

Please consider the following questions in the context of career development, looking ahead to how the employee's talents can best be leveraged for the company's benefit and their own.

What are the employee's "secret strengths?" Are there things the employee enjoys and excels at but is not responsible for in their current role?

What kind of work would you like to see the employee do more of?

What kind of work would you like to see the employee do less of?

What other roles in the company can you envision the employee in and/or would you like to see the employee pursue?

What additional resources and support does the employee need in order to grow in the company?

Section 4: Overall Assessment

How would you evaluate the employee's overall performance in the course of the review period? What are the most important or impressive skills and strengths the employee brings to their role?

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Performance Level	Does Not Meet Expectations	Reliably Meets Expectations	Often Exceeds Expectations	Consistently Exceeds Expectations
Comments				