



Performance Progress Review Template

Questions for New Hires

Instructions for Employees and Managers

Please evaluate the new employee's performance progress in each of the categories below, drawing upon established onboarding metrics, a review of their work product and/or results, informal observation, and/or feedback from the new 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 using a casual, 3-point scale for evaluating the performance and/or progress of new employees.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
Performance Level	Gotta Work On This	Good Job	Goes Above and Beyond

Performance Levels, Defined

1. **Gotta Work On This:** Performance progress is not trending as well as we'd like. Quantity and quality of work are inconsistent or insufficient and should be improved upon.
2. **Good Job:** Performance is progressing effectively and typically meets the expectations of the role. Quantity and quality of work are consistently good.
3. **Goes Above and Beyond:** Performance progress is excellent and outpaces the expectations of the role at this point in time. Quantity and quality of work are impressive.

Section 1: Performance Progress

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

Diligence:

Employee demonstrates reliability and effective time management, planning, organizing and executing their work, and delivering high-quality results by designated deadlines; Is consistent, persistent and detail-oriented.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
Performance Level	Gotta Work On This	Good Job	Goes Above and Beyond
Comments			

Collaboration:

Employee engages with peers and partners in a cooperative and cohesive fashion; working in tandem to maximize their contribution and achieve mutual goals; Is receptive to feedback and responsive to redirection.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
Performance Level	Gotta Work On This	Good Job	Goes Above and Beyond
Comments			

Communication:

Employee communicates effectively in a manner that 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; Engages with colleagues and/or customers in a warm, welcoming and inclusive fashion.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
Performance Level	Gotta Work On This	Good Job	Goes Above and Beyond
Comments			

Initiative:

Employee demonstrates a drive to succeed; Is achievement-oriented and resourceful, recognizing opportunities for improvement and pursuing them in self-directed fashion; Asks questions, seeks information and solicits insights to support their development.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
Performance Level	Gotta Work On This	Good Job	Goes Above and Beyond
Comments			

Job Knowledge:

Employee is progressing as expected with regards to their knowledge of the technologies, tools and techniques of effective performance in the role; Understands the importance of their position and the impact of their efforts on colleagues, customers and the company as a whole; Adheres to company policies, practices, procedures and performance standards.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
Performance Level	Gotta Work On This	Good Job	Goes Above and Beyond
Comments			

Section 2: Pulse Check and Redirect

Please consider the following questions in the context of the new employee’s tenure with the company and their continued development over the next 90 days. This is your opportunity to offer encouragement and insight regarding specific developmental goals to aim for or tactics to employ in reaching goals.

- 1. What are the most important or impressive skills and strengths the employee brings to their role and/or team?
- 2. How does the employee’s experience in their new role compare to how the role was characterized during the recruiting process? Does the role and/or team meet their expectations? Have there been any surprises they did not anticipate?
- 3. What would you like to see the employee do more of? What is working well so far?
- 4. What would you like to see the employee do less of? Is there anything that is preventing the employee from reaching their full potential?
- 5. What additional resources, support, and/or training would the employee benefit from in order to excel in their role?

Section 3: Overall Assessment

How would you evaluate the new employee’s engagement level in the course of the orientation 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
Performance Level	Gotta Work On This	Good Job	Goes Above and Beyond
Comments			

Considering all of the above, how would you evaluate the employee’s performance progress over the course of the orientation period? Please provide an overall score along with any additional feedback you’d like to offer.

Performance Rating	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3
Performance Level	Gotta Work On This	Good Job	Goes Above and Beyond
Comments			

