



Annual Review Template

Directions: This annual review template includes a self-evaluation and a manager evaluation. Each evaluation should be done with the employee's goals top-of-mind. Evaluations should be completed before the annual meeting, then discussed in the meeting between manager and employee.

Self-Evaluation

Please take some time to reflect on your work over the past year and share answers to the following questions with your manager.

What are your biggest accomplishments from the past year?

What do you want to improve upon in the coming year?

On a scale from 1-5, how would you rate the company at recognizing your contributions?

1. I never feel my contributions are recognized.
2. I rarely feel my contributions are recognized.
3. I feel my contributions are recognized some of the time.
4. I feel my contributions are usually recognized.
5. I feel my contributions are always recognized.

On a scale from 1-5, how much do you think your work contributes to the company's overall goals?

1. I never feel my work contributes to the company's overall goals.
2. I rarely feel my work contributes to the company's overall goals.
3. I feel my work contributes to the company's overall goals some of the time.
4. I feel my work contributes to the company's overall goals most of the time.
5. I feel my work always contributes to the company's overall goals.

Manager Evaluation

Please take time to reflect on the employee's work over the past year. Keep feedback focused on actions and back it up with specific examples.

What are the employee's biggest accomplishments from the past year?

What can the employee improve upon in the coming year?

On a scale from 1-5, how would you rate the company at recognizing the employee's contributions?

1. The employee's contributions are never recognized.
2. The employee's contributions are rarely recognized.
3. The employee's contributions are recognized some of the time.
4. The employee's contributions are usually recognized.
5. The employee's contributions are always recognized.

On a scale from 1-5, how much does the employee's work contribute to the company's overall goals?

1. The employee's work never contributes to the company's overall goals.
2. The employee's work rarely contributes to the company's overall goals.
3. The employee's work contributes to the company's overall goals some of the time.
4. The employee's work contributes to the company's overall goals most of the time.
5. The employee's work always contributes to the company's overall goals.

Annual Review Meeting Outline

Review employee's goals

1. Tie the employee's goals the team and company goals
2. Highlight completed goals and see if non-completed goals need to be revised

Highlight the successes

3. Ask the employee to share their biggest success from the past year
4. How does this relate to the company's success?
5. Call out additional successes the employee didn't mention.

Call out areas for improvement

6. Ask the employee to share their areas for improvement
7. Confirm or push back on employee's critiques of themselves
8. Call out any other areas for improvement
9. Finish by reaffirming the employee's accomplishments



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