

Performance Review: Team Member Sheet

You and your Manager/Supervisor should fill in separate sheets, then meet together to discuss what each other has written. Use the comments section if you wish to clarify any of your rating assessments.

Team member name:	Position title:
Review date:	Manager/Supervisor:

Job Performance

		Poor 1	2	Good 3	4	Excellent 5
1 Quality of work (customer and management perception); low error rate	Self					
	Comments					
2 Dependability	Self					
	Comments					
3 Job knowledge; professional and technical skills	Self					
	Comments					
4 Oral communication skills (e.g. performance at meetings and presentations, etc)	Self					
	Comments					
5 Written communication skills (e.g. standard of reports, briefs, quotes, etc.)	Self					
	Comments					
6 Organisation of self, files and administrative work	Self					
	Comments					
7 Productivity and efficiency	Self					
	Comments					
8 Achievement of financial targets	Self					
	Comments					
9 Committed to improving the company (e.g. through ideas, problem-solving, assisting and motivating others, etc)	Self					
	Comments					
10 Relationship with colleagues; interpersonal skills	Self					
	Comments					

		Poor 1	2	Good 3	4	Excellent 5
11 Relationship with clients; client care; keeping clients happy	Self					
	Comments					
12 Dispute resolution	Self					
	Comments					
13 Accurate administrative tasks (e.g. quoting, invoicing, reports, budget tracking, etc)	Self					
	Comments					
14 Attitude; enthusiasm	Self					
	Comments					
15 Initiative and motivation	Self					
	Comments					
16 Keeping supervisors informed of progress	Self					
	Comments					
17 Meeting project deadlines; prioritising	Self					
	Comments					
18 Timekeeping and timesheets	Self					
	Comments					
19 Attendance; punctuality	Self					
	Comments					
20 Ability to work unsupervised	Self					
	Comments					
21 Projecting a professional image of the company (e.g. through appearance, conversation, conduct, etc)	Self					
	Comments					

Overview

What are your strongest points, and how can they be used to best advantage (for you, your clients, your team)?

What are your weakest points, and how could you improve?

What are your manager's strengths and weaknesses?

How could your manager help you more? (e.g. *environmental, personal, systems, advice, support, advocacy, etc*)

What additional training or tools would help you?

Where can you see your career in 5 years time? What do you need to do now to achieve your long-term professional goals?

Other points you'd like to discuss:

Goals

Identify two professional goals you will work toward this year.
Goals should be SMART (Strategic/Specific, Measurable, Attainable, Results-oriented, and Time-bound).

GOAL 1

STRATEGIC/SPECIFIC
GOAL AND ACTION
STEPS:

HOW I WILL MEASURE
THE RESULTS:

HOW I KNOW IT'S
ATTAINABLE:

EVIDENCE I WILL
PRESENT TO SHOW I
HAVE ACHIEVED OR AM
MAKING PROGRESS:

THE REALISTIC TIME
FRAME FOR EACH
ACTION STEP:

Do you require additional resources or assistance to achieve your goal?

GOAL 2

STRATEGIC/SPECIFIC
GOAL AND ACTION
STEPS:

HOW I WILL MEASURE
THE RESULTS:

HOW I KNOW IT'S
ATTAINABLE:

EVIDENCE I WILL
PRESENT TO SHOW I
HAVE ACHIEVED OR AM
MAKING PROGRESS:

THE REALISTIC TIME
FRAME FOR EACH
ACTION STEP:

Do you require additional resources or assistance to achieve your goal?

KPIs

The KPIs (Key Performance Indicators), below, have been identified as important areas of focus for the team this year.

KPI 1	KPI 2	KPI 3
DESCRIPTION: Regular and accurate timesheet completion.	DESCRIPTION: XX	DESCRIPTION: XX
OBJECTIVE: Timesheet is fully completed and submitted at the end of each day.	OBJECTIVE: XX	OBJECTIVE: XX
BENEFITS: Accurate time-sheet records will translate into accurate billings and increased revenue for the company. Ensures that all chargeable time is captured and invoiced, and all non-chargeable time is monitored.	BENEFITS: XX	BENEFITS: XX
START DATE: 1 July 2014	START DATE: XX	START DATE: XX
END DATE: 1 January 2015	END DATE: XX	END DATE: XX
REPORTING FREQUENCY: Timesheet submission daily.	REPORTING FREQUENCY: XX	REPORTING FREQUENCY: XX
HOW KPI WILL BE MEASURED: Manager will check submitted timesheets at the end of each week.	UNIT OF MEASURE: XX	UNIT OF MEASURE: XX
TARGET VALUE: 1 timesheet per day.	TARGET VALUE: XX	TARGET VALUE: XX
UPPER AND LOWER TOLERANCES: All (one timesheet) or nothing (no timesheet). Zero is not an option!	UPPER AND LOWER TOLERANCES: XX	UPPER AND LOWER TOLERANCES: XX
ANTICIPATED UPPER AND LOWER LIMITS: NA.	ANTICIPATED UPPER AND LOWER LIMITS: XX	ANTICIPATED UPPER AND LOWER LIMITS: XX
IS KPI INTERNAL OR CUSTOMER-FACING: Internal.	IS KPI INTERNAL OR CUSTOMER-FACING: XX	IS KPI INTERNAL OR CUSTOMER-FACING: XX