Performance Review: Manager Sheet

Team Member and Manager/Supervisor to 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 the 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					
	Comments					
2	Dependability					
	Comments					
3	Job knowledge; professional and technical skills					
	Comments					
4	Oral communication skills (e.g. performance at meetings and presentations, etc)					
	Comments					
5	Written communication skills (e.g. standard of reports, briefs, quotes, etc.)					
	Comments					
6	Organisation of self, files and administrative work					
	Comments					
7	Productivity and efficiency					
	Comments					
8	Achievement of financial targets					
	Comments					
9	Committed to improving the company (e.g. through ideas, problem-solving, assisting and motivating others, etc)					
	Comments					
10	Relationship with colleagues; interpersonal skills					
	Comments					

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

Overview

What are your team member's strongest points, and how can they be used to best advantage (e.g. for themselves, their clients, your team)?

What are your team member's weakest points, and how could they improve themselves?

What are your own strengths and weaknesses?

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

What additional training or tools can you provide?

How can you help your team member achieve their long-term (5 years+) goals?

Other points you'd like to discuss:

Goals

Discuss the two goals your team member has identified.
Determine how you can help him/her to track, measure and achieve those goals.

KPIs

Identify three KPIs (Key Performance Indicators) as important areas of focus for your team this year.
Once completed, copy this section to your Team Member's Performance Review sheet, ready for you both to discuss.

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