

Annual Performance Review

Review Template Questions

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.

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

- 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.

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

(Insert space for commentary)

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.

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

(Insert space for commentary)

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.

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

(Insert space for commentary)

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

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

(Insert space for commentary)

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.

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

(Insert space for commentary)

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.

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

(Insert space for commentary)

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.

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

(Insert space for commentary)

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.

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

(Insert space for commentary)

Section 2: Results & 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.

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?

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

(Insert space for commentary)

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?

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

(Insert space for commentary)

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?

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

(Insert space for commentary)

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?

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

(Insert space for commentary)

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?

(Insert space for commentary)

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

(Insert space for commentary)

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

(Insert space for commentary)

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

(Insert space for commentary)

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

(Insert space for commentary)

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?

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

(Insert space for commentary)

Link To The ClearCompany Best Practices Guide for Annual & Semi-Annual Reviews

ClearCompany's corresponding Best Practices Guide for Annual & Semi-Annual Reviews for **Non-Exempt Employees** provides the rationale behind the questions included in this performance review template and outlines our workflow and best

practices recommendations for an annual performance review.

Refer to both our Best Practices Guide and the Review Template to easily design and execute your review cycle and facilitate productive performance conversations between employees and managers.

- ClearCompany Semi-Annual and Annual Best Practices Guide for Non-Exempt Employees