

Annual Performance Review

Template Questions

Managerial Employees

Instructions for Managerial Employees and Leadership Teams

Please rate the managerial employee's effectiveness in each of the categories below, drawing upon established performance metrics, a review of their work product and/or results, and an evaluation of their effectiveness in leading a team and/or coaching staff; as well as informal observation and/or feedback from the managerial employee's colleagues, clients, customers, direct reports, 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 the managerial employee meets with the leadership team 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

- 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.
- Reliably Meets Expectations:** Performance is effective and typically meets the expectations of the role. Quantity and quality of work are consistently good.
- Often Exceeds Expectations:** Performance is excellent and outpaces the expectations of the role on an ongoing basis. Quantity and quality of work are impressive.
- 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 managerial employee's effectiveness in each of the categories below and provide commentary to support and substantiate your rating.

Organizational Leadership: Manager articulates and/or exemplifies the organization's vision, mission, and core values, connecting each to their direct reports' individual efforts and outcomes, is knowledgeable of best practices and recent trends in the industry, and ensures team members have access to the same, along with training on effective use of resources, including processes, systems, tools, and technologies.

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)

Coaching: Manager cultivates a culture of continuous improvement and supports professional development by offering staff opportunities to develop new knowledge, skills, and abilities, establishes ambitious but attainable goals, inspires a sense of purpose, motivates the team to pursue peak performance, employs a candid and collaborative approach to performance improvement, and sets clear expectations around deliverables and 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)

Collaboration: Manager facilitates an environment in which employees are empowered to capitalize on their strengths and skills for the benefit of the team, seeks information, solicits insights, and shares expertise in an effort to increase impact and improve results, and recognizes, respects, and/or rewards the contributions of their direct reports as well as their peers and partners.

1	2	3	4
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<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
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(Insert space for commentary)

Decisiveness: Manager makes critical decisions and takes action readily and responsibly in response to emerging opportunities and/or obstructions, working to manage or mitigate impact and considers options, outside influences, and ideal outcomes in alignment with organization's strategic objectives.

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)

Impact: Manager identifies and acts upon opportunities to increase productivity and/or propel profitability, leads individuals and/or team to produce a high volume of high-quality work that adds value and drives results, ensures individual and team deliverables are planned, prioritized, organized, and executed on-time and in-budget, and delegates responsibility and entrusts others with stretch assignments according to their ability, aptitude, and ambition retaining accountability for designated outcomes.

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)

Inclusivity: Manager is fair and impartial, exhibiting respect for individuals from all walks of life, including those whose lived experience differs from their own, demonstrates interest in and openness to opposing opinions, is receptive to new ideas, methods, procedures, and/or techniques, and actively works to solicit them from others in a supportive 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)

Innovation: Manager exhibits curiosity and creativity in pursuit of continuous improvement, is skilled in ideation, casting a vision, communicating ideal outcomes, and executing strategies for achieving them, demonstrates a degree of risk tolerance that allows for experimentation and iteration in spite of ambiguity, implements new processes, products, and/or projects, and/or improves upon existing ones.

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)

Interpersonal Skills: Manager demonstrates emotional intelligence and employs active listening when engaging with others, expresses ideas and conveys information in a clear, concise, and compelling fashion in conversation and in writing, speaks candidly to ensure messages — including those that are difficult to deliver — are understood as intended. Manager navigates tension and manages conflict between parties with divergent interests and motivations by offering solutions and strategies for diffusing friction and achieving consensus in a manner that is empathetic but not emotional.

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)

Influence: Manager engenders trust and earns the support of others, mobilizing and motivating them to advance initiatives, achieve results, and/or expand their impact and is persuasive and persistent, inspiring action in pursuit of opportunity and achievement.

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
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(Insert space for commentary)

Problem Solving: Manager anticipates, identifies, and addresses real and potential problems, internally and externally and examines root cause(s), analyzes options, offers alternatives, and develops contingency plans in order to avoid or overcome obstacles and/or unintended consequences and achieve optimal outcomes.

1	2	3	4
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(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 manager's effectiveness over the course of the review period? What are the most important or impressive skills the manager 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 manager's engagement level in the course of the review period, including the extent to which they reflect and reinforce company culture? Which core value does the manager best exemplify?

1	2	3	4
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(Insert space for commentary)

How would you evaluate the manager's impact and contributions in the course of the review period? What are the manager and/or their team's most significant accomplishments and/or 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 manager's commitment to continuous improvement and/or professional development in the course of the review period? In what ways have you observed growth, development, and/or improvement on the part of the manager and/or the team they lead?

1	2	3	4
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(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 manager's talents can best be leveraged for the company's benefit and their own.

What are the manager's "secret strengths?" What attributes make them great to work with?

(Insert space for commentary)

What are the manager's "conspicuous struggles"? What would make them a more effective leader?

(Insert space for commentary)

What would you like to see the manager do more of?

(Insert space for commentary)

What would you like to see the manager do less of?

(Insert space for commentary)

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

(Insert space for commentary)

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

(Insert space for commentary)

Section 4: Overall Assessment

Considering all of the above, how would you evaluate the manager's overall performance in the course of the review period? Please provide an overall score along with any additional feedback you'd like to offer.

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 **Managerial Employees** provides the rationale behind the questions included in this performance review template and outlines our workflow and best practices recommendations for this 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 Managerial Employees