

Annual Performance Review

Review Template Questions

Exempt Employees & Individual Contributors

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.

Accountability: Employee exhibits ownership for the outcome(s) of their work, takes responsibility for their mistakes when necessary and adjusts their efforts accordingly, and is receptive to redirection as priorities and/or strategies evolve.

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)

Business Literacy: Employee understands the organization's operational objectives as well as best practices and recent trends in the industry; identifies and acts upon opportunities to increase market share, increase productivity, and/or propel profitability where applicable, and makes competent 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)

Collaboration: Employee works in partnership with others to capitalize on the strengths and skills that each offer, seeks information, solicits insights, and shares expertise in an effort to increase impact and improve results, and recognizes and respects the contributions of their peers and partners.

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)

Drive: Employee demonstrates a growth mindset, seeking out opportunities to develop new knowledge, skills, and abilities in pursuit of achievement and continuous improvement, establishes ambitious but attainable goals and pursues them in a proactive and self-directed fashion, and is resilient in the face of adversity.

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: Employee exhibits respect for individuals from all walks of life, including those whose lived experience differs from their own, demonstrates interest in and openness to opinions from others, and is receptive to new ideas, methods, procedures, and/or techniques.

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: Employee demonstrates emotional intelligence and engages with others in a manner that is empathetic and responsive to their needs, expresses ideas and conveys information in a clear, concise, and compelling fashion in conversation and in writing, and employs active listening and speaks candidly to ensure messages — including those that are difficult to deliver — are understood as intended.

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: Employee 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.

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)

Planning & Organization: Employee prioritizes, plans, organizes, and executes work autonomously, and proactively manages deadlines, deliverables and communications in order to complete projects and/or tasks on time. Employee schedules PTO with advance notice and notifies the appropriate parties when ill or injured. Employee provides teammates with the direction and background required to keep projects and priorities on track in their absence so that business continues to run smoothly when they are out.

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)

Problem Solving: Employee anticipates, identifies, and addresses real and potential problems, internally and externally, 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
<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)

Results: Employee demonstrates a commitment to producing a high volume of high-quality and high-impact work, maintains high standards, and works diligently to meet them, delivering accurate, complete, neat, and thorough work product.

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 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 have 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 projects or positions 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 **Exempt Employees & Individual Contributors** 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 Exempt Employees and Individual Contributors