

# 6 Essential Performance Management Templates

 For 2023

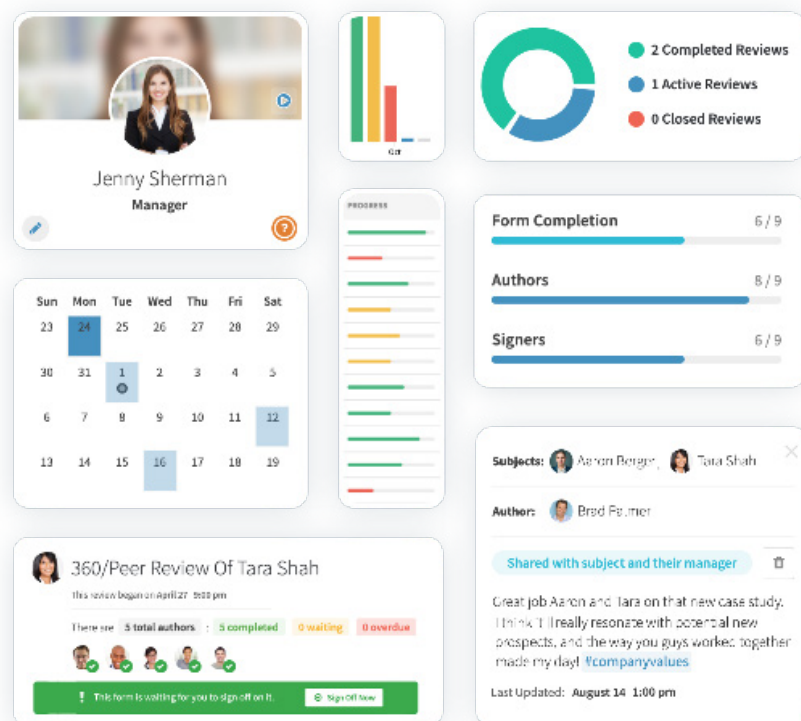


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# Build Your Unique Performance Management Process

Your organization is unique, and your performance management strategy should be too. The templates in this packet provide a “best-practice” approach to performance reviews.

**Once you review the templates,** the next step is to learn how PerformYard can help you put these reviews into action.



PerformYard software embraces your requirements, so you can manage your entire vision from one place; including:

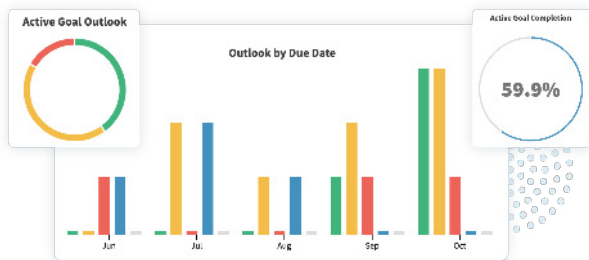
**Reviews**

**Goals**

**Feedback, and**

**Reporting**

# Employee Goal Setting



Goals can be powerful tools for helping us live up to our highest potential or helping our teams perform their best.

But too often, goals at work feel like irrelevant administrative tasks forced on us by others.

## Have you ever had to set a goal for the sake of having a goal?

The best way to fix any goal-setting processes is to set really effective goals. The power of goals starts with what you choose and how you word them.

Getting that step right is necessary to see any value from your goal-setting process.

## This is a framework for setting effective goals based on the research of Dr. Edwin Locke and Dr. Gary Latham (the pioneers of modern goal setting).

Locke and Latham spent many years researching what types of goals drive high performance. This template takes their findings to help you set the most effective goals for yourself or your team.

After working through this chapter, you'll understand how to develop several clear, effective, and inspiring goals to pursue, along with a wealth of goal-setting knowledge.

### ***Start With Goals You're Committed To***

For your goals to be effective, they need to inspire commitment and determination.

This is especially important when goals are difficult. You're more likely to follow through when things get tough if you're trying to accomplish a goal that you're committed to.

**So how can you ensure you're committed to your goals? Locke and Latham believe the two key factors of commitment are:**

- The results of completing your goal are meaningful to you or to your organization
- You believe you can achieve your goal (i.e., self-doubt won't hinder your commitment)

**Try asking yourself these questions as you think about your commitment to your goals:**

- What is the most important thing you can be working on? What vision of the future excites and inspires you?
- What is worth working really hard for?
- What do you believe the best version of you can achieve?

Remember that your answers to these questions don't need to be static. Finding motivation for yourself and leading others is often about inspiring commitment to goals and developing the confidence to strive for them.

Write down up to three goals that inspire a sense of commitment and determination.

### *See a Path to Completing Your Goals*

Now that you've set a few goals that you're committed to and excited about, it's time to break down how you're going to reach them.

The most effective goals are for tasks or projects that have a somewhat clear path to success. Have you ever set a goal that just sits on your to-do list forever because you had no idea how to get started? The motivating impact of goals works best when you know how to approach the goal.

As you move further from your expertise, you need to engage in more problem solving to complete your goal. Problem solving isn't linear—it involves a lot of stops, starts, and dead ends. It's hard to create a well structured goal for such an uncertain activity.

You can still have big uncertain goals, but it's best to break them down into smaller goals that you have more clarity on how to complete.

### *As you look at the goals you just set, ask yourself:*

**Is it pretty clear what I need to do to achieve this goal?**

If not, start by thinking what sub-goals could you set to start moving in the right direction, or help you get more clarity on how to achieve your bigger goals.

For example, if you're not already an expert on health and fitness and you have a goal to lose five pounds, you could start by trying to lose one pound.

Then find a fitness plan you're excited about and try to lose two more pounds. Stick with your fitness plan for the next six weeks and lose three more pounds.

### ***Decide What Done Looks Like***

Great goals don't leave any room for interpretation—they are crystal clear.

In order to have clarity, your goals need to have a deadline. An easy goal can be made difficult with a tight deadline and therefore drive high performance.

Additionally, you should define what reaching the goal looks like. “What done looks like” is a popular term in product management, as product managers define the outcomes of each project before starting. This is an important aspect of goal setting and helps everybody understand what goal completion looks like.

This can include using metrics so your goals are measurable, but it could also mean giving a lot of elaboration or clarity for more hard to measure goals.

The purpose of having crystal-clear goals is to set a standard from the beginning that can't be moved.

***Rationalizing a version of your goal that's easier to achieve halfway through a project can leave you feeling unmotivated.***

**Be sure your goals avoid any vague generalities. As you work to add clarity to your goals, ask yourself the following questions:**

- Does the goal have a deadline?
- Is there only one definition of what done looks like?
- How do you know you're making progress towards being done?
- Is there any way for this goal to be misinterpreted or watered-down later?

### Challenge Yourself

At this point, your goals should require commitment, have a clear path forward, and be crystal clear. But one of the most important characteristics still remains—do your goals challenge you?

Goals should push you slightly beyond your current skill set. When you believe you can achieve a goal but know it will be tough, you'll feel energized and excited about the prospect of succeeding at something meaningful.

On the other hand, if you don't think the goal will challenge you, you won't be inspired by it. And if you think the goal will be too difficult to accomplish, you can become overwhelmed and give up on it.

**As you can see, it's tough to strike the right balance between challenging and attainable. Consider these questions when working to find your balance:**

- Have you done something like this before? Will it require you to learn a new skill?
- Will you be able to use some of the skills you already have? Does it put you outside of your comfort zone?

Now let's take another look at your goals. Do they challenge you just beyond your current skill set? If not, what can you do to make them challenging but within reach?

Remember that goal-setting is a living, breathing process. The setting and pursuit of goals is the most important process. So don't be afraid to review and reset goals frequently. Stale and irrelevant goals don't have any power.

It's important to meet with your manager often to discuss your goals, evaluate progress, and make adjustments as needed.



# 360 Review Process

Our 360 review process template includes a timeline, quick feedback guide for employees, peer review questions and process suggestions. Please use the template as a jumping off point and make changes to suit the needs of your organization.

## Timeline



### *Reviewing the Timeline*

The suggested timeline spans five weeks. It uses a staged approach that allows managers to read and analyze peer and self reviews before creating their own summary review.

This approach spreads the review cycle over a longer period of time, allowing employees to make a case for themselves in their self review ahead of the manager's review. Also, peer reviews can be screened and summarized by the manager to help create a clearer narrative.

In the following sections, we break down each stage and provide process suggestions.

### *Before Your Cycle: Feedback Training*

- **Quality feedback is essential to the success of a 360 review.** You should take time to train employees on how to write constructive feedback that helps, rather than hinders employee development. We suggest you share these guidelines when you launch your performance review cycle.
- **Keep positive feedback meaningful:** Reserve recognition for great performance. Don't try and sugarcoat a review by including irrelevant or overblown praise. This can create a confusing message, distorting other feedback.
- **We're not suggesting that you go negative!** Simply focus on the extraordinary in actions big and small.
- **Support positive feedback with details:** Focus on what went right and why. Digging into all the gritty details focuses feedback on actions rather than just results. Positive feedback feels good, but it should also help us learn from our success.
- **For negative feedback, be a coach:** It can be easy to call out all the things you think went wrong, but it's much harder to show someone the path to what's right. Highlight potential solutions rather than dwell on the examples of failure.
- **Focus on work, not character:** No one wants to be judged on their character. It isn't productive, makes people defensive, and doesn't provide solutions.

### *Before Your Cycle: Feedback Training (Cont.)*

- **Frame your feedback around the work itself.** For example, don't say, "you're unorganized." Say, "you're forgetting to call people back, and that's a problem because..."
- **Provide examples:** Concrete examples help employees understand the feedback, and they provide a better foundation for conversation. For example, rather than saying, "you're missing too many deadlines," say, "you missed the deadline for these five projects..."

### *Break Down By Stage*

#### *Stage 1: Nominate Reviewers*

The key to a good nomination process is clear criteria. Decide ahead of time who should be reviewing whom. For project-based organizations, team leads will often be chosen to provide 360 feedback. For employees working onsite, clients can be chosen.

Managers can receive feedback from their direct reports. Employees can receive peer feedback from their immediate team, or from other departments their team interacts with frequently. No matter which criteria you choose, stick to it.

Next, ask employees or their managers to choose 3-5 reviewers based on the criteria. This can also be done by HR if they have the data necessary.

Following the nominations, have managers or HR review the choices. 360 reviews are about uncovering new and diverse feedback, so reviewers should not always come from the same small circle of close colleagues.

### ***Stage 2: Peer Reviews***

With peer reviews, we're looking for more and diverse feedback, not a final answer on performance. Stick with high level questions that draw out details you won't get from a manager review. A simple rating or yes/no question on overall performance is also useful. Keep the forms short; employees need to fill out multiple peer review forms and should be able to complete them efficiently.

**Here are a few questions that we've found to be very effective.**

- Share examples of when this employee contributed at a very high level.
- Share examples of when this employee could have done better.
- Would you always want to have this employee on your immediate team? (Yes/No)

### ***Stage 3: Sign-Off on Peer Reviews***

Managers should sign off on peer reviews. This ensures the feedback is constructive and gives managers time to follow up with reviewers if anything needs clarification. If you are very concerned about problematic feedback, or you need more time to train managers on effective feedback, HR can also sign-off at this stage and use it as a training opportunity.

### ***Stage 4: Manager Reviews***

In a 360 review, the manager review can serve to create a throughline or cohesive narrative that helps the employee interpret peer feedback and decide how to act upon it.

A common complaint against 360s is that employees get lots of feedback dumped on them and then feel overwhelmed, hurt, alone, and unsure what to do next. A good manager review addresses this issue. Managers can also provide more context on what feedback deserves the highest priority.

**Here are three prompts we've used to focus manager reviews:**

- From the peer feedback on positive contributions, find up to three themes and sort them from highest to lowest impact. Support the themes with examples from peers or your own experience.
- From the peer feedback on opportunities for improvement, find up to three themes and sort them from highest to lowest priority. Support the themes with examples from peers or your own experience.
- Share additional context you think is important for any specific pieces of peer feedback.

### ***Stage 5: Sign-Off on Manager Reviews***

HR and/or leadership should sign off on manager reviews. The sign-offs can seem like unnecessary steps, but they create valuable checkpoints in the review process that HR can use to make sure everyone is completing their reviews.

They also are an opportunity for training, improving the process during the current cycle. Having HR and leadership read these manager reviews will also give the company a better understanding of how teams are functioning.

Put those reviews to work for good!

### Stage 6: Performance Review Meeting

- **Send your employee their completed 360 review ahead of their in-person review meeting.** We find the sweet spot to be a few hours to one day ahead of the meeting. This way, your employee has the opportunity to review and digest the feedback. Providing feedback in advance can take the stress out of review meetings, as employees know what is on the table ahead of time. However, don't send the package too early, as you don't want people stewing on things for days before they have the opportunity to get the full context.
- **If you're training employees well enough on providing quality feedback, and fixing any poorly presented feedback** in the sign-off steps, then we'd suggest presenting the employee all the feedback attributed to the people who provided it. That said, you may want to run a cycle or two with anonymous feedback until employees are comfortable receiving peer critiques.
- **When it comes to the in-person meeting, set aside plenty of time for the manager and employee to have a thorough discussion of the feedback.** This meeting is what everything has been building towards. The result of a 360 review is not a bunch of filled out forms; it's an informed and productive discussion of past and future performance.
- **We suggest starting the meeting with a review of employee goals.** It may be counterintuitive, but starting with a discussion of the employee's and company goals helps align the rest of the conversation around a purpose. For example, instead of saying, "I'd like you to be better at X," you can say, "Improving at X will help us achieve Y."
- **Then move on to a discussion of what's going well,** giving the employee plenty of time to advocate for themselves.

Finally, discuss areas of improvement. It's important to let the employee kick off this section of the review, as it leads to productive and less defensive conversations. If you're already in agreement on certain points, then there is no need to harp on understood shortcomings. Instead, engage around solutions.

**Remember: this is an opportunity for growth and development. Focusing on a solution, rather than failure, will provide the employee with a path forward.**

# Values-Based Review

The values-based review template includes a selfreview, a 360-peer review, a manager review, and a meeting outline. Each template is based on one company value and should be repeated for each company value.

The reviews should be completed before the manager and employee connect for a values-based review meeting.

## What Does The Review Meeting Look Like?

The meeting will start by reviewing the employee's goals and explaining how each of the company's values ties to the goals.

There will also be a review the goals that weren't completed and talk about how the employee can meet them moving forward.

Make sure to share the employee's 360 peer reviews with the employee starting with the positive comments, and share the manager feedback with the employee, starting with the positive comments.

## Some Tips to Improve The Review Meeting

- Be specific and read out the employee's self-review, starting with the positive comments.
- Have a conversation about how the employee can improve.
- Share the employee's peer reviews, moving on to the areas for improvement
- Share the manager feedback with the employee, moving on to the areas for improvement
- Read out the employee's self-review form, moving on to the areas for improvement.
- Come to an agreement with the employee about what they can do to improve moving forward.

### *Examples of Values to Use in Values-Based Reviews:*

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- **Customer Service** - Employees respond quickly to client requests, act appropriately, adapt to customer feedback, and create strong relationships.
- **Respect** - Employees validate their client's problems and their coworker's ideas, keep an open mind, and are professional in work settings.
- **Positivity** - Employees identify solutions when presented with problems, strive to find progress every day, and encourage their colleagues to overcome obstacles.
- **Creativity** - Employees provide innovative solutions, brainstorm effectively, and support an atmosphere of creativity.
- **Leadership** - Employees take ownership of their mistakes, lead colleagues by example, and manage conflict in constructive ways.
- **Quality** - Employees meet expectations for their job output make few mistakes and complete work on time.
- **Integrity** - Employees do not lie or mislead colleagues, they do not cut corners, and have open and appropriate communication with colleagues.
- **Hard work** - Employees are present, work to exceed expectations, and push themselves to be more efficient.
- **Initiative** - Employees work to solve problems before they are asked, are aware of client needs, and meet them proactively.



### Self-Review

Please take some time to reflect on your work as it relates to the company's values and share answers to the following questions with your manager.

- How would **you rate yourself** in living up to the company values?
- **Describe a project or interaction in which you exemplified this company's values.**
- **Describe a project or interaction in which you could have done a better job of exemplifying this company's values.**

### 360 Peer Review

When doing a 360 review reflect on your co-worker's work as it relates to the company's values. Keep feedback focused on actions and back it up with specific examples:

- How well has **the employee lived up to** the company values?
- Describe **a recent interaction you had with the employee** in which they exemplified the values.
- Describe a recent interaction you had with the employee in which **they could have done a better job** of exemplifying the values.

### Manager Review

When reviewing an employee review take time to reflect on the employee's work as it relates to the company values. Keep feedback focused on actions and back it up with specific examples.

- How well **has the employee lived up** to the company values?
- Think of an example of **the employee successfully demonstrating this company's values** in action.
- Think of an example of a time when the employee **could have shown a better understanding** of this company's values.

# 90 Day Review

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The 90 day performance review is made up of a self-review, manager review and employee-manager meeting. The self-review should be completed first and shared with the manager.

The manager then completes their review and provides it to the employee at least 24 hours ahead of the scheduled meeting. This staged approach allows for both the manager and new employee to come to the 90 day performance review meeting prepared for an effective discussion.

## A 90-Day Performance Review Should Provide:

### 1. A Benchmark for Measuring Performance

90-day reviews serve as an excellent benchmark during onboarding to measure a new employee's performance in a realistic timeframe. After 90 days, new employees should feel independent enough to be held accountable for their performance at the company.

### 2. An Opportunity to Ask Questions

The review provides employees the chance to discuss any questions, requests, or concerns that may have surfaced during their first 90 days at their new job with their managers. They can receive feedback on their initial performance to help them understand what's working and where they can make improvements.

### 3. A Solid Foundation for Manager-Employee Relationships

While a large percentage of starting a new job has to do with tasks and projects, there's also a large social component to a new hire's first 90 days. A 90-day review can help your new hire ask questions to better understand the lingo, meeting dynamics, and general culture of your organization that they've observed.

### Self-Evaluation

When taking a self- evaluation take some time to reflect on your first 90 days with our organization and share answers to the following questions with your manager.

- How **does your new role compare to the expectations you had** coming in?
- Is the type of work you have been doing **in line with your personal goals** for this role?
- **How do you feel about your new employer**, what are you excited about and what concerns do you have?
- What part of our culture has **resonated the most** with you? What part would you like to **evolve**?
- Share **feedback on your onboarding experience**? What went well? Where do you feel there were gaps?
- What is **the best part of working with your manager**? What could be improved?
- What elements of your new role have you **most excelled at**? What elements do you most **need to improve**?
- Share **your goals** for this role.

### Manager-Evaluation

When taking a self- evaluation take time to reflect on the new employee's first 90 days. Keep feedback focused on actions and back it up with specific examples.

- In what ways **has the employee excelled during their first 90 days**? Share examples.
- In what ways **does the employee need to continue to develop** in order to be a top contributor to our team?
- **Rate the employee's performance in their first 90 days**, and describe how you got to that rating.
- Provide **guidance on how the employee can continue to develop** and improve their performance.

# Mid-Year Review

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The mid-year review includes a self- evaluation, a manager evaluation, and a meeting agenda.

Once both review forms have been completed, the manager and direct report can schedule a meeting that centers around the review form answers.

## 3 Reasons to Use Mid-Year Reviews

- 1. Everyone sees the big picture:** Employees can call out their wins and see how they progressed over the past 6 months. Managers can mention how an employee's performance changed across the calendar year. This allows both parties to examine trends in performance, and understand why those trends occurred.
- 2. Employees can highlight all the accomplishments they've completed:** Often-times, managers are stretched thin, and may not be aware of all of the great work each direct report has accomplished. An mid-year review allows employees to present all of their best "wins" to their managers, letting managers see how invaluable their work has been.
- 3. Your company gets actionable data:** Using a Performance Management System like PerformYard gives you access to actionable data about the company, team, and individual performance. This type of hard data is excellent for determining compensation and promotions, one of the key reasons why annual reviews are completed in the first place.

### Self-Evaluation

Please take some time to reflect on your work over the six months and share answers to the following questions with your manager.

- How would you **rate yourself on performing your job duties** over the past six months?
- How would you **rate yourself on showing initiative** over the past six months?
- How would **you rate your satisfaction with your role** over the past six months?

### Manager Evaluation

Take time to reflect on the employee's work over the past six months. Keep feedback focused on actions and back it up with specific examples.

- What is one area in which **the employee has excelled** over the past six months?
- What is **one area in which the employee could improve** over the next six months?
- How would you **rate the employee's ability to perform their job duties** over the past six months?
- How would you **rate the employee on showing initiative** over the past six months?

### ***What Does The Mid-Year Review Meeting Look Like?***

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**The meeting will start by reviewing the employee's goals and explaining how each of the company's values ties to the goals:**

- Are they on track?
- Do any goals need to be revised?
- What does the employee need from the manager to complete the goals in the next six months?

**Review the ratings and review forms:**

- For questions in which the employee and manager ratings align, manager should explain why they gave the score they did and ask why the employee gave the score they did.
- For questions in which the ratings don't align, manager should give the employee a chance to explain their rating first. Manager should then explain why they gave their rating.

**Talk about how to keep positive trends going**

- Highlight positives from manager review form

**Talk about how to make improvements**

- Highlight the opportunities for improvement from the manager review form

**End by discussing how manager can better support employee**

- Discuss last question about manager support from employee review form

# Annual Review

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This annual review includes a self-evaluation and a manager evaluation.

***Each evaluation should be done with the employee's goals top-of-mind.***

Evaluations should be completed before the annual meeting, then discussed in the meeting between manager and employee.

## 3 Reasons to Use Annual Reviews

- 1. Everyone sees the big picture:** Employees can call out their wins and see how they progressed over the year. Managers can mention how an employee's performance changed across the calendar year. This allows both parties to examine trends in performance, and understand why those trends occurred.
- 2. Employees can highlight all the accomplishments they've completed:** Often-times, managers are stretched thin, and may not be aware of all of the great work each direct report has accomplished. An annual review allows employees to present all of their best "wins" to their managers, letting managers see how invaluable their work has been.
- 3. Your company gets actionable data:** Using a Performance Management System like PerformYard gives you access to actionable data about the company, team, and individual performance. This type of hard data is excellent for determining compensation and promotions, one of the key reasons why annual reviews are completed in the first place.

### Self-Evaluation

When taking a self- evaluation use some time to reflect on your work over the past year and consider:

- What are **your biggest accomplishments** from the past year?
- What do **you want to improve upon** in the coming year?
- How would you **rate the company** at recognizing your contributions?

### Manager Evaluation

When evaluating employees, reflect on the employee's work over the past year. Keep feedback focused on actions and back it up with specific examples.

- What are **the employee's biggest accomplishments** from the past year?
- What **can the employee improve upon** in the coming year?
- How would you **rate the company at recognizing** the employee's contributions?
- **What can the employee improve upon** in the coming year?






## What Does The Annual Review Meeting Look Like?

The meeting will start by reviewing the employee's goals and explaining how each of the company's values ties to the goals.

There will also be a review the goals that weren't completed and talk about how the employee can meet them moving forward.





## Make sure to highlight their success

- Ask them to share their biggest success from the past year, and how it relates to the company's success as a whole.
- Be personable and call out additional successes the employee didn't mention.

SUBJECT	DUE DATE	AUTHOR PROGRESS	SIEMERS PROGRESS	OVERALL PROGRESS
 Ian Cowles	Dec 3, 2019 5:30 pm	<div><div></div></div>	<div><div></div></div>	
 Monica Green	Dec 3, 2019 5:30 pm	<div><div></div></div>	<div><div></div></div>	Completed Nov 13, 2019 4:32 pm
 Patricia Wolfe	Dec 3, 2019 5:30 pm	<div><div></div></div>	<div><div></div></div>	Completed Nov 15, 2019 4:51 pm

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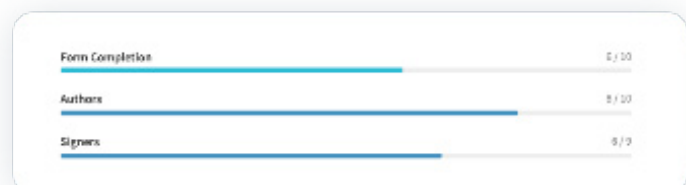
### Self Evaluation Form

Who authors this form:	 Employee being reviewed
Who signs off on this form:	 Employee's manager
Authors due date:	Jul 21 2020 5:00 pm
Signers due date:	Aug 4 2020 5:00 pm
Visible to the subject (when all authors/signers are finished): 	
Redact authors: 	

[Edit](#) [Delete](#)

## Ask the employee to share their areas for improvement

- Confirm or push back on employee's critiques of themselves
- Call out any other areas for improvement
- Finish by reaffirming the employee's accomplishments



# **Performance Management That's Easy For Everyone**

For annual reviews, quarterly goals, continuous feedback and everything in between, PerformYard's #1 rated software offers flexible features for HR and creates a simple employee experience.

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