



Annual Performance Review Form

Employee Information

Employee Name:

Role / Title:

Level (if applicable):

Review Period:

Date of Review:

Reviewer / Manager:

1. Purpose of Review

This annual performance review is designed to provide structured feedback on performance, support professional development, align individual goals with company objectives, and ensure fair, consistent, and transparent evaluation in line with HR best practices.

2. Role Clarity & Core Responsibilities

Briefly outline the key responsibilities of this role:

Assessment:

Exceeds expectations

Meets expectations

Developing / partially meets expectations

Does not meet expectations

Comments:

3. Performance Review by Competency

Rate each area based on performance over the review period.

Rating Scale

1 = Needs Improvement

2 = Developing

3 = Meets Expectations

4 = Exceeds Expectations

5 = Exceptional

A. Quality of Work

Consistency, accuracy, technical skill, attention to detail

Rating: 1 2 3 4 5

Comments:

B. Productivity & Time Management

Efficiency, organization, meeting deadlines, managing workload

Rating: 1 2 3 4 5

Comments:

C. Client Experience & Service Standards

Professionalism, communication, relationship-building, service delivery

Rating: 1 2 3 4 5

Comments:

D. Teamwork & Collaboration

Communication, respect, contribution to team culture, support of others

Rating: 1 2 3 4 5

Comments:

E. Accountability & Reliability

Attendance, punctuality, follow-through, ownership of responsibilities

Rating: 1 2 3 4 5

Comments:

F. Initiative & Growth Mindset

Learning, adaptability, problem-solving, openness to feedback

Rating: 1 2 3 4 5

Comments:

4. Achievements & Contributions

Key accomplishments during this review period:

5. Areas for Development

Skills, behaviours, or results that require improvement or further development:

6. Professional Development & Training

Education, training, mentoring, or support recommended:

7. Goals for the Coming Year

Goals should be clear, measurable, and aligned with business objectives.

Goal	Measurement of Success	Timeline

8. Overall Performance Summary

Overall Performance Rating:

- Exceptional
 Exceeds Expectations
 Meets Expectations
 Developing
 Unsatisfactory

Summary Comments:

9. Compensation / Role Discussion (if applicable)

- Compensation reviewed
 Role level reviewed
 Promotion discussed
 No change at this time

Notes:

10. Employee Self-Reflection

Employee comments, reflections, or response to this review:

11. Acknowledgement & Signatures

This review has been discussed and acknowledged. Signing does not necessarily indicate agreement, only that the review has been received and discussed.

Employee Signature: _____ Date: _____

Manager Signature: _____ Date: _____

Confidential HR Document

This document is confidential and will be retained in the employee's personnel file in accordance with company policy and applicable employment standards.
