thrive at work

FREE TEMPLATE · PERFORMANCE

Employee performance review template

A complete review form for managers and employees: goals, core skills, self-review, a capacity check-in and a development plan.

How to use this template

1. Send the self-review section to the employee one week before the meeting.
2. Fill in the goals and skills sections yourself, with one concrete example for every rating.
3. Hold a 45 to 60 minute conversation. Listen first, then share your view.
4. Agree two or three development priorities and a date to check progress.
5. Both sign, and keep a copy in the employee file.

> **Tip:** rate the work, not the person. Every rating below 3 or above 4 needs an example the employee will recognize.

1. Employee details

Employee name	
Job title	
Team / department	
Manager	
Review period (from – to)	
Date of review meeting	

2. Rating scale

Score	Label	What it means
5	Exceptional	Consistently goes well beyond what the role requires; others learn from how they work.
4	Strong	Regularly exceeds expectations in this area.
3	Meets expectations	Delivers what the role requires, reliably.
2	Developing	Meets some expectations; needs support to close specific gaps.
1	Not yet meeting	Falls short of what the role requires; a plan is needed.

3. Goals from the last period

List the goals agreed at the start of the period. Rate each one and record what happened.

Goal	Rating (1–5)	Evidence and comments

4. Core skills and behaviors

Area	Rating (1–5)	Example
Quality of work		
Productivity and reliability		
Communication		
Collaboration and teamwork		
Problem solving and judgment		
Ownership and initiative		
Learning and adaptability		
Leadership (if managing people)		

5. Capacity check-in

Strong performers are often the first to run low. Ask these questions openly; they are not rated and do not count toward the overall score. Capacity is the energy, recovery, focus and resilience a person has available to sustain performance.

Question	Notes
How is your energy across a normal week?	

Question	Notes
Do you get enough recovery between working days?	
Can you focus on your most important work, or are you constantly interrupted?	
What would make your workload more sustainable?	

6. Employee self-review

To be completed by the employee before the meeting.

Question	Answer
What are you most proud of from this period?	
What did not go as planned, and what did you learn?	
Which part of your role gives you the most energy? Which drains it?	
What support do you need from your manager?	
What would you like to learn or take on next?	

7. Overall rating and summary

Overall rating (1–5)	
Key strengths	
Areas to develop	
Manager summary	

8. Development plan

Priority	Action and support	Owner	By when

9. Signatures

	Signature	Date
Employee		
Manager		
Second-level manager (optional)		

The employee signature confirms the review took place, not agreement with every rating. Add employee comments here:

> **About thrive at work.** thrive at work is an employee engagement platform that also measures capacity to perform. One anonymous survey shows which teams are thriving and which are running low, then turns results into action plans. thriveatwork.ai