**Employee Performance Evaluation Form & Worksheet How to Use**

Use this form and the accompanying worksheet to conduct an employee performance evaluation. This is an important activity to engage with the employee, rate and agree on their performance level and to plan for performance improvements. It is also an opportunity to clarify performance expectations.

This form is a tool, but the real benefit is in the discussion and agreement on what is being performed well and what needs to improve. It is also a great opportunity to give praise and positive feedback.

You can also replace this form with an online app or software that will allow you to keep records of each performance evaluation review session and refer to it. However, this form is a simple yet still effective approach.

The important thing is to choose the correct evaluation criteria for the job. This is where many business owners and managers stumble if they have never done this before. Writing good job performance criteria is a skill that needs to be practiced.

To keep things simple for you, I have listed five universal core employee performance competencies. I used information from a behavioral assessment tool that is used to better understand employees and why they tend to perform in their own unique way. If you do not have the time or expertise to develop your own performance criteria, you can use these five competencies on the next page. Otherwise just replace these with your own.

Again, the most important thing is to conduct the evaluation session rather than putting it off because you have not prepared proper performance criteria.

Another way to define the performance criteria is from the job description if you have one. If not, you can use my job description form template and sample to get started. On page two of that form there is a section for defining minimum performance criteria for the most important tasks and responsibilities. You can [download that from the forms and templates section of my website.](https://www.optimusperformance.ca/wp-content/uploads/2018/06/Job-Description-Template-English-Updated-2018.docx)

On the following page, there are columns on the left for levels of importance for the competency and levels of achievement on the right. Each column has two squares, one for the manager and the other for the employee. You can use the first square in each row for the managers evaluation and the other for the employee.

Print out this form and give it to each employee to be evaluated. Each of you should complete on your own before the meeting. The idea is not to influence each other, but to discuss gaps in perception of performance. It is good to keep an employee performance record for each person and note down both good and poor performance, so you have concrete examples when discussing. This form is also free to download.

Once you share your perceptions come to an agreement on the scores. Then go onto the next page to discuss a plan for performance improvement. This might include things the manager might need to provide to support the employee’s development such as training, coaching, information etc.

**Date of Performance Evaluation:**

**Name of Employee:**

**Name of Manager:**

**Name of Company & Department:**

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| --- |
| **EMPLOYEE PERFORMANCE EVALUATION** |
| LEVELS OF IMPORTANCE |  | LEVELS OF ACHIEVEMENT |
| LITTLEIMPORTANCE | SOMEIMPORTANCE | IMPORTANT(Average)( | MAJORIMPORTANCE | CRITICALIMPORTANCEc | **CORE COMPETENCY** | POOR | FAIR | GOOD(Average) | GREAT | STAR |
| 2 | 4 | 6 | 8 | 10 |  | 2 | 4 | 6 | 8 | 10 |
|  |  |  |  |  | Productivity – effectiveness in getting things done, in relation to time and cost requirements |  |  |  |   |  |
|  |  |  |  |  | Quality of work – adherence to an expected standard of result that is a part of a job or activity |  |  |  |   |  |
|  |  |  |  |  | Initiative – the ability to act without the help or insistence of others |  |  |  |   |  |
|  |  |  |  |  | Teamwork – a cooperative effort by a group or team to produce a desired result |  |  |  |   |  |
|  |  |  |  |  | Problem solving – process of finding a way to successfully resolve a difficult situation or problem |  |  |  |   |  |
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**Individual Development Worksheet: KSS Improvement Method**

1. **Productivity or specific competency:**
2. What should the employee keep doing?
3. What should the employee stop doing?
4. What should the employee start doing?
5. **Quality of work or specific competency**
6. What should the employee keep doing?
7. What should the employee stop doing?
8. What should the employee start doing?
9. **Initiative or specific competency**
10. What should the employee keep doing?
11. What should the employee stop doing?
12. What should the employee start doing?
13. **Teamwork or specific competency**
14. What should the employee keep doing?
15. What should the employee stop doing?
16. What should the employee start doing?
17. **Problem Solving or specific competency**
18. What should the employee keep doing?
19. What should the employee stop doing?
20. What should the employee start doing?
21. **What training or resources is required to support the employee? Who will provide it, how and when?**
22. **When will you meet to follow up on improvements? Set day and time and add to your agendas**

**Signed and accepted on this date:**

Employee \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Manager\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_