

bob



Reshape your review cycles:

# PERFORMANCE REVIEW TEMPLATES





There is always room for improvement, no matter what.

It's a classic saying that has been passed down through the ages as a gentle reminder that nobody is perfect—as much as we may like to hope or believe that we might be the one to defy the rule.

Being open to criticism or feedback can be difficult. But in the working world, **performance reviews** are an invaluable resource for HR professionals, as well as managers and employees. Whether it's peer to peer, manager to employee, or employee to manager, there's always something that can be improved upon.

So if these reviews are such a valuable resource, why are they so often dreaded? It may be because criticism is often seen as a negative, whereas the truth is that it can be anything but. Effective performance reviews allow people and businesses to learn, grow, and develop for the better. They allow you to align expectations, set goals, and improve overall performance.

But how can you create a performance review that isn't seen as a negative experience? And how can you make sure that you're reaching your remote employees in the same way that you're reaching your in-house employees?

We'll take a closer look at how HR professionals should go about setting up an effective, open review process and provide you with some 'grab and go' templates that can help you shape your performance reviews into something that is not only welcomed by employees but helps better your business as a whole.





# How to shape your performance reviews

As we mentioned earlier, performance reviews shouldn't be a negative experience. They are a chance for both employees and managers to grow and improve each other. Knowing how to set up a review process is just as important as carrying out the review effectively.

That's why we've put together a [performance review checklist](#) with some points that you should focus on when setting up your review process..

## Regular is better

Performance reviews are traditionally a yearly event where an employee's performance over the last 12 months is scrutinized and judged. But in the modern workplace, people are seeing less and less value in annual appraisals. They're far too infrequent and can contain information which—if relating to an event that perhaps happened at the start of the year—is completely outdated and irrelevant.

The more that you can either give or receive feedback, the more natural it becomes. Whether that's more regular monthly feedback sessions or a frequent and relaxed weekly meeting where people can openly discuss work and any issues that have cropped up.

If good work is highlighted and issues are addressed, people will have a far better idea of exactly where they stand and what is expected of them.

## Concentrate on development and growth

When carrying out performance reviews, you should be focused on making sure that you are enabling a steady flow of constructive feedback. Your aim should be to highlight some areas where they have delivered some standout performances, as well as some other areas that could use a bit of work. This will help them to develop into a more rounded, but still confident, employee.

By the end of your reviews, your employees should be able to identify what steps they need to take in order for them to properly develop and be successful in both their role in your team and their overall career.



## Make use of 360-degree review processes

The traditional performance review system of a supervisor or manager reviewing the people that report to them is starting to become outdated in the modern workplace.

There is now a trend of what's called a 360-degree review. This is a tool that is used to give your employees anonymous feedback from a variety of different directions—including from their direct managers and from their peers. Employees can also assess their performance themselves via a self-evaluation. In addition, the 360-degree process equally gives employees the opportunity to review upward and give feedback to their managers.

This means as much information as possible can be gathered and used to drive development, improve performance, and further individual and team growth.

## Reviews are a two-way street

Performance reviews don't have to be a one-sided affair. While there may be some important topics that need to be addressed, people should be encouraged and welcomed to discuss other issues and come up with their own questions.

This means that managers or HR professionals need to be ready to receive feedback as well as give it. This two-way system helps the review process become a productive and open experience that can go some way toward improving your employees' morale and making them feel heard and valued.

## Promote honesty

Honesty is integral to a good performance review. If your employees feel that they need to veil their feedback then you may never be able to get to the root of an issue and growth can be hindered.

That's why it is important to encourage people to answer the questions as authentically and honestly as possible. This can be done by making it clear that anything they say in performance reviews will be kept confidential, and they won't be punished for expressing their opinions.



## Don't forget your remote employees

Some of your employees may be working in a hybrid or remote fashion, but that doesn't mean that they shouldn't get just as much attention and care as the ones who are in the office next to you.

Communication with remote employees is key—that's why it can be argued that performance reviews for your remote employees are even more important. So make sure that you are regularly checking in and chatting with people who aren't on site.

While it may not be as easy as an in-person meeting, the meetings can still be done through Zoom, on the phone, or even through instant messaging.

It's vital that you make an effort to make your remote employees feel comfortable. But you'll have to alter your methods to fit a digital frame. Here's a couple of top tips for remote performance reviews:

### **Put a face to the name**

When possible, use video conferencing to speak to your employees. So much of our communication as human beings is non-verbal and this is lost when you can't actually see each other.

### **Get rid of distractions**

You want your remote employees to feel as valued as your in-house ones. So make sure that when you're speaking to them, you're giving them your undivided attention. Doing things such as ensuring you're not interrupted for the call, turning off email alerts, and coming to the meeting fully prepared can make a big difference.

### **Double-sided discussions**

Remote employees can often feel unheard. If they're not physically present, it can be easy for them to be pushed to the side and their opinions and ideas lost. So when talking to your remote employees, make sure that you've set aside enough time to listen to them. These conversations should always be a two-way street. coming to the meeting fully prepared can make a big difference.



# Performance review templates

In the spirit of 360-degree feedback, we've created three free performance review templates that can be used for your reviews. The templates are for:

- A manager's review of an employee
- A peer's review of a peer
- An employee's review of a manager

These templates can be used either directly or as a base point for you to create your own performance review templates with questions that are more specific to you and your business. HR professionals can share these templates with managers, peers, and anyone else that is involved in the review process in order to have more effective performance reviews.

It's important to note that remote and hybrid working is prevalent in the modern workplace. Because of this, some of your questions may have to be adapted in order to better suit your remote workers.

**We've added some asterisked questions in each template that are relevant for hybrid or remote workers, and these can be added to get more detailed insight.**



## Manager review of employee

A manager's review of their employee is the classic performance review. A dedicated and involved manager should have a relatively detailed understanding of the strengths and weaknesses of each of their team members, so it can be argued that they are best placed to review them.

This employee performance review template has been designed in order for managers to provide healthy feedback that also involves a fair amount of self-evaluation and reflection.

| Question   | Answer |
|--|--------|
| What motivates you to get your job done?                             |        |
| Which goals did you manage to meet?                                  |        |
| Which goals didn't you achieve?                                      |        |
| Which of your job responsibilities do you enjoy the most?            |        |
| Which of your job responsibilities do you enjoy the least?           |        |
| What type of career growth matters most to you?                      |        |
| What areas do you feel you could improve in?                         |        |
| What type of work comes easiest for you?                             |        |
| Do you feel you are more or less effective as a remote worker?*      |        |
| Are you keeping a healthy work/life balance while working remotely?* |        |



## Peer review of peer

A valuable part of the 360-degree review process is peer feedback. By creating a peer performance review, you are allowing a safe space for colleagues to give each other praise as well as constructive feedback. Not only does it allow for feedback from colleagues, but it also gives managers an insight into the inner workings of their employees and how they collaborate with each other.

This template has been designed to encourage employees to provide valuable feedback on their peers in a way that encourages honesty and fairness.

| Question   | Answer |
|--|--------|
| How has this person's work impacted you and your performance?                |        |
| How well has this person collaborated with the rest of the team?             |        |
| What have been this person's main successes in recent times?                 |        |
| What have been this person's main challenges in recent times?                |        |
| Do you feel this person follows through on their goals and expectations?     |        |
| Does this person have clear and concise communication?                       |        |
| Does this person consistently meet their deadlines?                          |        |
| What is one piece of constructive advice that you would give to this person? |        |
| Do you feel this person is able to contribute to a full extent remotely?*    |        |
| Is this person able to clearly communicate whilst working remotely?*         |        |





## Employee review of manager

Who said that employees can't review their managers? Workplaces shouldn't be treated as dictatorships, where everything comes down from on high with little to no input from the lower ranks. A happy workplace is one where everyone's voice can be heard and managers are open to change as much as the employees are.

This template has been created in order to encourage employees to provide their managers with constructive feedback in order to improve their work and relations.

| Question  | Answer |
|---|--------|
| Is your manager meeting your expectations?                                      |        |
| Do you feel comfortable approaching your manager with any issues?               |        |
| Do you feel supported in your work environment?                                 |        |
| Are you clear on who you report to?   |        |
| Do you feel that the group is working well as a team?                           |        |
| Where has your manager helped your work?  |        |
| Where has your manager hindered your work?                                      |        |
| How can your manager make our company more diverse and inclusive?               |        |
| What can your manager do to improve relations between management and employees? |        |
| Is there anything you need from your manager in order to better work remotely?* |        |
| Do you feel you have a satisfactory level of communication with your manager?*  |        |

## Develop and grow teams

Done properly, performance reviews are a fantastic way to communicate and properly share valuable feedback from within teams.

When continual feedback is being given to employees, there is far less doubt over what their goals and aims are. Meaning that employees can have absolute clarity on how they are progressing and what they need to improve on.

Whether it's by utilizing our templates or through **performance management software**, setting up a system that enables everyone to carry out reviews that focus on growth and development can make a huge difference to your business, and to the happiness of multiple teams within the company.





## Meet Bob

At HiBob, we've built a modern HR platform designed for modern business needs—today and beyond.

We know how important it is to make holistic, data-driven decisions about your people, especially in light of today's modern workplace trends. That's why we built Bob, a modern HR platform that reinvents old performance processes with new perspectives that focus on your people's feedback, goals, and growth.

The main tools that Bob uses to address these topics can be found in the advanced Performance Management feature which include everything you need to conduct 360-degree performance reviews.

### Performance management

Define and optimize your review cycles to create understanding, transparency, and mutual trust with your people

- 1.** Use one platform to run performance reviews for employees both near and far
- 2.** Set actionable goals to help employees progress and succeed
- 3.** Track progress and address issues and concerns in early stages
- 4.** Establish regular 1-on-1s between managers and employees for ongoing feedback