



Performance Appraisal Form

Section A – Employee Information

Name		Position	
Review Date		Reviewed By	

Section B- SMART Goals Review

Insert the SMART goals and the measurements defined for the last year. Then comment on your performance progression and completion status of meeting these goals.

SMART Goals	Measure/Metric	Comments
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Section C – Role Competencies

Exceeds Expectations	Consistently exceeds the expectations of the position including quantitative and qualitative targets.
Meets Expectations	Consistently performs all duties of the position in a fully capable manner; meets all expected criteria for quality, quantity and timeliness of work, including meeting goals and objectives.
Improvement Needed	Meets some goals and objectives, but requires improvement in quality, quantity, and/or timeliness of work to achieve overall satisfactory performance.

Competencies	Comments	Exceeds Expectations	Meets Expectations	Needs Improvement
Job Knowledge & Technical Skills General knowledge of _____	Click or tap here to enter text.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>Collaboration & Teamwork Works well with others in the company. Is able to resolve conflict; listens to others; is open to others' feedback and ideas; and shares ideas openly.</p>	<p>Click or tap here to enter text.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Customer Service Builds solid relationships with internal and external customers, including understanding their perspective. Anticipates future needs of customers and actively seeks out how to improve customer service.</p>	<p>Click or tap here to enter text.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Accuracy Produces work that is accurate due to attention to detail. Has systems in place to review work for accuracy and thoroughness.</p>	<p>Click or tap here to enter text.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Accountability Maintains a growth mindset; seeks feedback and is receptive to it as means for development. Committed to staying current with industry trends and learning new technology to work more efficiently.</p>	<p>Click or tap here to enter text.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Time Management Effective at setting priorities and allocating time to complete tasks. Keeps track of how long tasks can take and makes sure time is used efficiently.</p>	<p>Click or tap here to enter text.</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Section D – Future Planning & Career Development

With your Manager, define SMART goals for the following year and the way they will be measured. These will be reviewed for progress at Quarterly Planning Meetings and at next Performance Review.

Define tasks (SMART Goals) related to overall organizational deliverables Specific, Measurable, Attainable, Relevant, Timely	Measure/Metric	Comments
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

In collaboration with your Manager, list your Personal Career Goals and how you will make strides towards reaching these goals? (e.g. training, shadowing, course, temporary assignment, book, webinar)

Career Goal/Objective/Development	Actions/Steps to be taken towards Goal	Outcomes
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

Section E – Brag Section

Section F - Outcomes and Sign Offs

Overall Outcome	<input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Needs Improvement
Manager's Comments	Click or tap here to enter text.
Manager's Signature	
Employee's Comments	Click or tap here to enter text.
Employee Signature	