

DIRECTIONS FOR PERFORMANCE REVIEW TEMPLATE

The performance review template is set up so you can easily keep track of performance ratings and ensure that similar metrics and performance standards are used throughout your organization. The file is set to work with up to 20 employee reviews, however you can save different versions if needed.

Most pages follow this color-coding:

Green – where you can enter data that is vital for the formulas to work.

Grey – contains formulas that are mostly locked or hidden to avoid getting deleted.

The rest of the cells will not have any color and are mostly usable if you want to make changes or add notes.

Step 1: Preparing the file with your employee data

The measurements and weights you set for Employee #1 can be set to pre-populate all the other employee review pages. You can select Yes/No if you want each metric to apply to all. You may want to confirm that the metrics for the first employee you paste in, will apply to most. You can also customize each page with different metrics and weights.

- Paste your employee data into the All Employee Details page into columns (A-L).
- Enter the weights given to Manager vs. Peer review scores in column M & N. The total must add to 100%.
- If you are only using the manager's performance review, just enter 100% for the manager's weight.
- In the top section, enter the Evaluation Period and the Max Performance Rating:

Set Evaluation Period:	1/1 - 12/31
Set Max Performance rating:	5

All the details in this page, should now flow through into each employee's individual performance review page.

Step 2: Determine performance standards and goals to measure, then add weights to each

- Start with Employee #1 – The Metrics and weights entered here on page #1 can apply to all employee pages, by selecting Yes/No in column K:

Metric#	Metric	Examples	Weight	Max	Manager Score	Manager's Weighted Score	Peer Review Score	Peer Weighted Score	Apply this metric to all employee's scorecards?
1	Job Knowledge	How well I understand the fundamental skills, methods and procedures required in my present job	10.00%	5	enter score			0	Yes
2	Quality	Accuracy and completeness of my work	15.00%	5	enter score			0	Yes
3	Quantity	Amount of work I produce in my workday	2.50%	5	enter score			0	Yes
4	Attendance	Punctuality, conforming to work hours, and maintaining an acceptable attendance record	15.00%	5	enter score			0	Yes
5	Creativity	Ability to find new and better ways of doing things and to be imaginative	2.50%	5	enter score			0	No
6	Dependability	Ability to do required jobs safely and efficiently with a minimum of supervision.	15.00%	5	enter score			0	No

- Go through each metric and assign examples and weights. Easily measure up to 12 performance standards /metrics or goals. These fields are fully customizable and meant to be rated numerically.

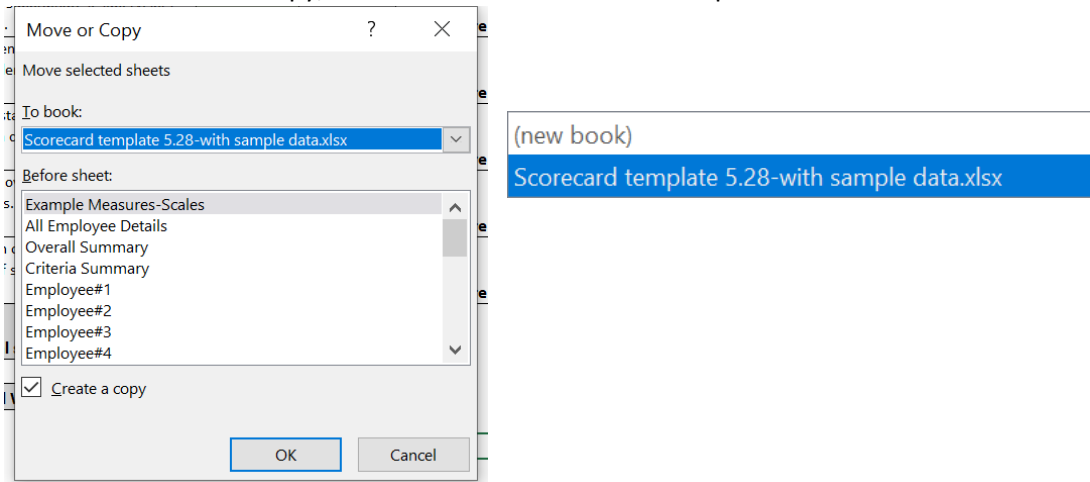
Tip - See the Example Measures-Scales for more ideas on the types of metrics you could use.

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- Whether you use 1 performance measurement at 100% weight, or all 12 with varying weights, all the weights combined should equal 100% in column D22.

Step 3: Conducting reviews

- Have managers go through and weight their employees on each metric
- If utilizing the Peer or Self Review scoring, you may want to print or create a copy of the employee review page
- To create a copy of the review page: right click the page/tab at bottom > select move or copy > Be sure to check the box: create a copy, then select New Book in the drop down next to 'To Book':



Step 4: Summarizing the performance reviews

After all employees have a completed performance review, there are several charts that will autofill:

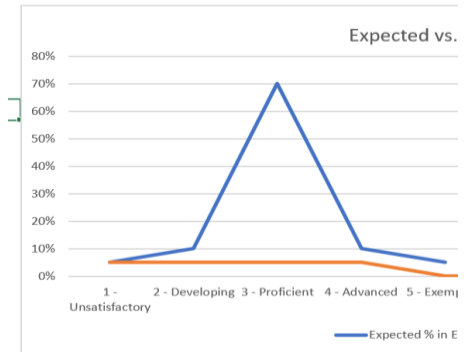
- 1) The Overall Summary page – Here you will need to enter the scales that you used, and which ratings you want to fall within different buckets or categories.
 - Set up to 10 ratings categories. For example, the below chart will group someone with a score between 0 to 1.7 into the category: 1-Unsatisfactory

Ratings	Low	High
1 - Unsatisfactory	1.00	1.70
2 - Developing	1.71	2.50
3 - Proficient	2.51	3.50
4 - Advanced	3.51	4.60
5-Exceeds Expectations	4.61	5.25

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- Next you can also set the percentage of employees you expect to see within each ratings category. The Expected vs. Actual chart will then show how your actual ratings compare to expected:

Ratings	Ratings Review		
	Expected % in Each	Actual Ratings	EE Count Receiving
1 - Unsatisfactory	5%	20%	1
2 - Developing	10%	20%	1
3 - Proficient	70%	20%	1
4 - Advanced	10%	20%	1
5-Exceeds Expectations	5%	20%	1



- The overall average rating per metric chart will also auto populate as the scorecards are updated with performance reviews.

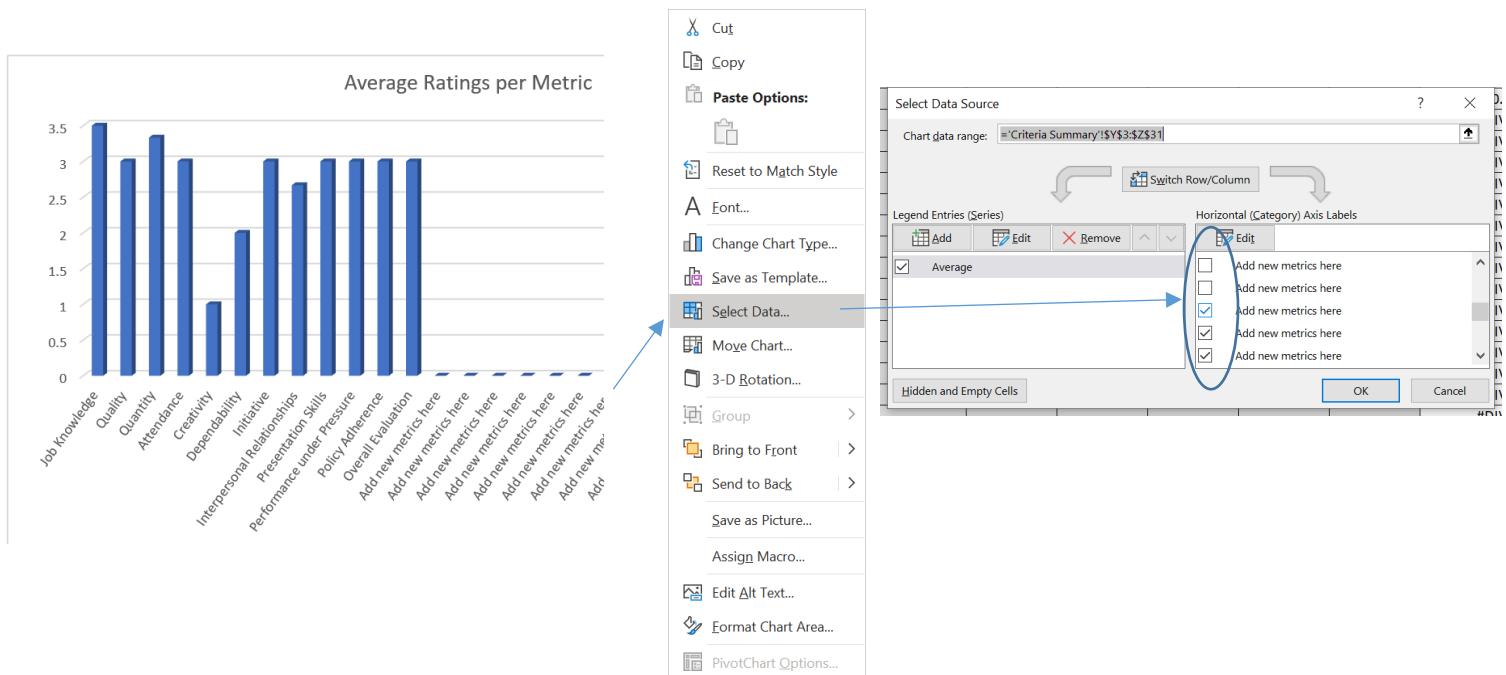
2) Criteria Summary page – This page will summarize the ratings per metric per employee, as well as the overall average incumbent rating per metric. This is a great way to view the strengths and opportunities of the team.

For the Average Ratings per Metric to be accurate:

- Be sure to add all the metrics used in all employee pages into the Criteria Summary page
- All metrics used for employee #1 will pre-populate into this page, but if a new metric is added to employee pages 2-20, you will also need to add that metric into the Criteria summary page in rows A16-A31.

**Average Ratings per Metric CHART tip- If there are extra metrics not being used, you can remove these from the chart:*

Right click on the chart, and click on 'Select Data' – then uncheck the boxes that say 'Add new metrics here' and click OK



For more information on how to best use your template and free spreadsheet tips, checkout these resources:

<https://timesavingtemplates.com/get-started-excel/>

<https://timesavingtemplates.com/freeresources>

<https://timesavingtemplates.com/faq>