

Template – Job performance appraisal

When you conduct performance appraisals with individual employees, it is imperative to have a form to record their progress along with their goals for the future. That way you can track their progress from one appraisal meeting to the next. We've provided a sample appraisal form here. You could modify it to match the headings in your employee's job description.

PRIVATE AND CONFIDENTIAL

EMPLOYEE'S DETAILS

Name

Position

Years/months employed in this position

Date of this review

Date of next review

Reviewer (name and position title)

PROGRESS TOWARDS GOALS IDENTIFIED IN LAST PERFORMANCE REVIEW (IF APPLICABLE)

Goal	Action taken	Completed?	Comments
Obtain forklift licence	Enrolled in course	No	Became sick during course. Theory completed, practical exam will be taken in November.
Build new shelves in storeroom	Designed shelves, bought materials and assisted with construction	Yes	New shelves are great, finished well under budget.

EMPLOYEE COMMENTS AND OPPORTUNITY TO EVALUATE OWN PERFORMANCE

The cash drawer tends to slam shut unexpectedly, therefore I become nervous while using it. I'd be more comfortable if this problem was fixed ...

REVIEW THE MAJOR SKILLS REQUIRED TO FULFIL THIS POSITION'S DUTIES

Check the relevant boxes to indicate the employee's performance in each area. If additional tasks have been performed, ensure these are added here and also to the employee's job description if required.

Task description (taken from job description)	N/A	Poor	Satisfactory	Good	Excellent	Comments
Customer service – help customers				X		
Maintain stock levels					X	
Accept payment		X				Cash drawer often does not reconcile