**Key Performance Indicators**

**About this document:**

This is a KPI document suitable for assessing the aptitude of employees and their performance. Use this document to review an employee’s current performance and set goals for future improvement.

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| **Employee** |  | **Manager** |  |
| **Position** |  | **Date** |  |
| **Employee signature** |  | **Manager signature** |  |

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| --- | --- | --- | --- |
| **Responsibility/goal** | **Expectations** | **Employer comments** | **Employee comments** |
|  |  |  |  |

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| --- | --- |
| **Manager action items** | **Employee action items** |
|  |  |

**Instructions for completion**

* Make goals SMART: specific, measurable, attainable, realistic and time-based.
* Set up and stick to a regular interview for reviewing KPIs.
* Review previous action items at the start of each meeting.
* Adapt KPIs to suit changing business roles and needs.

**Performance Review**

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| **Employee** |  | **Manager** |  |
| **Position** |  | **Date** |  |
| **Employee signature** |  | **Manager signature** |  |

**KPI review**

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| --- | --- | --- | --- |
| **Responsibility/goal** | **Expectations** | **Employer comments** | **Employee comments** |
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**Values review**

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| --- | --- | --- | --- |
| **Business value** | **Expectations** | **Employer rating** | **Employee rating** |
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**Career goals**

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| --- | --- | --- | --- |
| **Development area** | **Requirements** | **Training schedule** | **Results** |
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**Instructions for completion**

* Make goals SMART: specific, measurable, attainable, realistic and time-based.
* Set up a meeting to create and review goals with a week’s notice so all parties can prepare.
* Keep KPIs, values and career goals separate.
* Set expectations and deliver ongoing feedback so the performance review doesn’t come as a surprise.
* Remember that expectations should be tailored to the individual and measured accordingly.

**Development Plan**

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| **Employee** |  | **Manager** |  |
| **Position** |  | **Date** |  |
| **Employee signature** |  | **Manager signature** |  |

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| --- | --- | --- | --- |
| **Area** | **Training required** | **Employer commitments** | **Employee commitments** |
|  |  |  |  |

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| --- | --- |
| **Manager action items** | **Employee action items** |
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**Instructions for completion**

* Make development goals SMART: specific, measurable, attainable, realistic and time-based.
* Establish your employee’s best learning method (visual, auditory, kinesthetic) and what motivates them.
* Find practical training that can be converted into realistic workplace scenarios.
* Meet at regular intervals to discuss and work through the development plan.
* Review previous action items at the start of each meeting.