Performance Review Template for Managers

Use this step-by-step guide to bring structure, clarity, and impact to your performance reviews.

✅ Before the Review Cycle

- Set clear, role-based goals (OKRs/KPIs).

- Schedule quarterly goal check-ins.

- Document goals in your performance management system (e.g., Peoplebox).

During 1:1s and Check-ins

- Ask:

    - "What's blocking your progress right now?"

    - "What's a recent win you're proud of?"

    - "What feedback do you have for me?"

- Track responses for review prep.

✅ When the Review Cycle Starts

- Use a structured form covering:

    - Goals

    - Strengths

    - Growth areas

    - Action plan

- Share it with the employee ahead of time.

✅ Collecting Feedback

- Self-review questions:

    - "What are you most proud of this quarter?"

    - "Where did you struggle and why?"

    - "What support do you need?"

- Request peer feedback early with a clear deadline.

During the Review Meeting

- Structure the conversation: Wins → Challenges → Growth Plan.

- Use specific examples.

- Ask open questions and keep the focus on development.

After the Review

- Summarize: 3 takeaways + 1 development goal.

- Book a 30-day follow-up.

- Acknowledge progress and win along the way.

✅ **Pro Tip:** Automate this process using Peoplebox.ai to save time and ensure consistency across your team.