

Sample Performance Review (Self-Assessment and Manager Evaluations) Form

Powers Law Group, P.C.

EMPLOYEE SELF-ASSESSMENT AND MANAGER EVALUATION

The purpose of this form is to provide a place to reflect on the way team members are performing with specific responsibilities as described. The goal is to use this document to guide our conversation about performance, overall expectations, and ongoing growth.

Please complete sections I, II, III, IV, V, VI, and VII and return them to the Office Manager and Managing Attorney electronically 3 days before your meeting. Thank you!

I. Employee Information

Employee: _____

Date of Hire: _____

Performance Period (Begin Date – End Date): _____

Job Title: _____

II. Areas of Strength and Growth: The table below should first be completed by you, then by management. We will identify areas of strength and growth based on the competencies.

Guidelines:

- **Strength** is a competency area that assists you in adding value to the firm.
- **Growth** includes areas of challenge that you would like to develop to advance, either to perform better or to advance over the long term.

Within the Comments sections, note your **Performance Improvement Goals** for each area. Whether you have a Strength or Growth need, there is always an opportunity to improve. We'll select a Strength and Growth need for Section VI, and will outline the specific Development Plan together.

Competency	Employee Self-Assessment		Comments	Manager Assessment		Comments
	Strength	Growth Area		Strength	Growth Area	
Productivity – • Focus on high priority tasks • Minimize distractions • Systemize your work as much as possible to increase efficiency.	□	□	Note aspects of performance that are going especially well. What specific areas could be improved?	□	□	Note aspects of performance that are going especially well. What specific actions could the Employee improve upon?

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Organizational Capacity – • Orchestrates multiple activities at once to accomplish a goal. • Uses resources effectively and efficiently. • Arranges information and files in a useful manner. • Manages time efficiently	☐	☐		☐	☐	
Planning Capacity – • Accurately scopes out length and difficulty of projects. • Sets goals and breaks down work into process steps. • Anticipates and adjusts for problems. • Asks for help before it's too late.	☐	☐		☐	☐	
Problem Solving Approach – • Uses logic and appropriate methods to solve problems. • Analyzes issues honestly. • Looks beyond the obvious and doesn't stop at the first answers. • Turns to others for help and input at appropriate points.	☐	☐		☐	☐	
Job Knowledge – • Measures effectiveness in keeping knowledgeable of methods, techniques and required in your own job and related functions.	☐	☐		☐	☐	

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Time Management – - Values time - Multi-tasks - Uses time effectively & efficiently but does not rush. - Prioritizes	☐	☐		☐	☐	
Presentation and Meeting Skills - Is comfortable and effective in small and large groups. - Get a message across. - Can manage group processes during a presentation. - Ability to change tactics midstream when something isn't working.	☐	☐		☐	☐	
Writing Fluency – - Is able to write clearly and succinctly. - Articulates ideas and writes well. - Spelling & Grammar checks all communication before sending.	☐	☐		☐	☐	

III. Behaviors (Employee completes first, then Manager completes)

Key Behavior(s)	Strength	Needs attention	Employee Self-Assessment Comments	Strength	Needs attention	Manager Assessment Comments
Listening/Following Directions	☐	☐		☐	☐	
Client focus	☐	☐		☐	☐	