**Employee Review Template**

**INSTRUCTIONS**

**1.** HR or the employee fills in the employee’s personal and job details, as well as the review period.

**2.** The reviewer (typically the employee’s direct manager) fills in the core competencies, role-specific metrics, behavior examples, goals, and development plan details for the employee.

**3.** The reviewer uses the following rating scale to evaluate the employee: 1 = “falls below expectations”, 2 = “sometimes meets expectations”, 3 = “consistently meets expectations”, 4 = “exceeds expectations at times” and 5 = “consistently exceeds expectations”.

**4.** The employee adds their comments after reviewing the document and engaging in self-reflection.

**5.** HR adds a confidentiality statement, and the relevant parties acknowledge it by signing the document.

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| **Employee name** |  | **Review period** | Q4 2025 |
| **Job title** | HR Manager | **Department** | Human Resources |

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| **Core competencies***List the skills and behaviors expected of all employees. Evaluate each one to obtain a balanced view outside of role-specific results. In the example below,* [*AIHR’s T-shaped HR Competency Model*](https://www.aihr.com/hr-competency-model/) *has been applied.* |
| **Core competency 1** | Business acumen | **Rating** | 3 |
| **Core competency 2** | Data literacy | **Rating** | 4 |
| **Core competency 3** | Digital agility | **Rating** | 3 |
| **Core competency 4** | Communication skills | **Rating** | 3 |
| **Core competency 5** | People advocacy | **Rating** | 3 |
| **Core competency 6** | Execution excellence | **Rating** | 4 |

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| **Role-specific metrics***Include and rate key performance indicators (KPIs) and objectives and key results (OKRs) to tie employee performance directly to their job responsibilities.* |
| **Key performance indicators (KPIs)** |
| **KPI 1** | % of HR business-aligned initiatives; % improvement in business impact metrics | **Rating** |  |
| **KPI 2** | Number of data-driven decisions; % of initiatives backed by analytics insights | **Rating** |  |
| **Objectives and key results (OKRs)** |
| **OKR 1** | 100% of HR initiatives mapped to strategic business objectives | **Rating** |  |
| **OKR 2** | Quarterly review of business impact metrics | **Rating** |  |

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| **Behavior examples***Detail concrete examples of employee behavior using observable facts under the Situation–Action–Result (SAR) model.* |
| **Example using Execution Excellence and Data Literacy dimensions from the T-shaped HR Competency Model** |
| **Situation** | The HR department faced delays in recruitment reporting due to manual processes, affecting quarterly business reviews. |
| **Action** | * [Employee name] analyzed reporting workflows using people analytics to identify bottlenecks
* They implemented a dashboard using the company’s HRIS system to automate data collection and visualization
* Collaborated with IT and recruitment teams to ensure alignment with hiring KPIs.
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| **Result** | * Reporting time was reduced by **60%**, data accuracy increased to **98%**
* Leadership gained real-time insights to improve workforce planning
* This project was recognized as a key enabler for faster hiring decisions.
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| **[Add relevant situation to provide context for employee behavior evaluation.]** |
| **Situation** | [List key details of the situation.] |
| **Action** | [List the actions the employee took to handle the situation.] |
| **Result** | [List the results of the employee’s actions.] |

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| **Goals***Assess goals from the previous review period and list goals to achieve by the next review period. Present them using the SMART (specific, measurable, achievable, relevant, and time-bound) method.* |
| **Business acumen** |
| **Goal 1** | **By June 30, align at least 3 HR programs directly with strategic business objectives by conducting strategy co-creation workshops with leadership and implementing measurable business impact metrics for each initiative.*** **Specific:** Strengthen alignment between HR initiatives and business strategy by increasing strategic co-creation activities.
* **Measurable:** Collaborate with business leaders to launch 3 new HR initiatives tied directly to organizational strategic priorities.
* **Achievable:** Partner with senior leadership and key stakeholders to define business priorities and identify high-impact areas.
* **Relevant:** This ensures HR is positioned as a strategic business partner driving organizational outcomes.
* **Time-bound:** Complete within the next 6 months.
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| **Goal 2** |  |
| **Data literacy** |
| **Goal 1** | **By July 31, launch 2 new HR digital solutions (e.g., AI-powered recruitment tool and automated onboarding system) with a 90% user adoption rate, reducing process time by 30%.*** **Specific:** Drive digital adoption within HR by introducing new digital solutions.
* **Measurable:** Introduce 2 new digital HR tools or automations and achieve 90% user adoption rate across the team.
* **Achievable:** Builds future-ready HR functions aligned with digital transformation strategies.
* **Relevant:** Faster hiring reduces lost productivity, helps hit product and revenue targets.
* **Time-bound:** Within 6 months.
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| **Goal 2** |  |

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| **Development plan***This plan will outline the skills the employee needs to build, required learning actions, and resources the organization will provide.* |
| **Data-driven decision-making** |
| **Skill** | Workforce analytics and data storytelling (turn HR data into clear insights and actions) |
| **Required learning** | * How to pull clean reports from HRIS/ATS
* Excel (pivot tables), basic SQL, and data visualization (e.g., dashboards)
* Core metrics: attrition, quality of hire, time to fill, DEI representation, engagement
* Basics of statistics in plain terms: trends, cohorts, confidence, sample bias
* Framing insights as business recommendations (so what/now what).
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| **Provided resources** | * Tool access — HRIS reporting, an approved BI tool, and a safe data sandbox
* Training budget for a short analytics course or certification
* A data mentor (from People Analytics or Finance) and a monthly review cadence
* Time allocation (e.g., 4 hours/week) to build one live HR dashboard and present it quarterly
* A shared metric dictionary to ensure definitions are consistent across teams.
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| **[State an area in which the employee needs (further) development.]** |
| **Skill** | [Include a relevant skill the employee must learn to make them more efficient in this area.] |
| **Required learning** | [List the learning requirements for the employee to obtain the skill mentioned above.] |
| **Provided resources** | [List the resources the company will provide to support the employee in this aspect.] |

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| **Employee comments***Employees should use this section to record their own perspective on their performance, and acknowledge the feedback they’ve received.* |
| [Add relevant details not already in the review to provide more information for reflection and further insight.] |

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| **Confidentiality statement***Read and acknowledge the below statement before signing this document.*  |
| [Include the relevant confidentiality statement in this section after consulting with your legal and HR teams.] |
| **Acknowledgement and signatures** |
| **HR contact person** |  | **Direct manager** |  | **Employee** |  |



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