

# Appraisal template

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Name of employee:

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Name of team leader:

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Date:

Appraisal duration:

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## General feeling at work

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## OPEN QUESTIONS

### Strengths

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What are your strengths?

Are you able to utilise your strengths in your work?

How can you further develop your strengths?



## Goals for the future

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What do you want to achieve?

What would be a suitable time period for reaching those goals?

Are your goals in line with the company's goals?

## Action points

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What are the actions required to reach the objectives listed?

Does reaching the objectives require a new project or some additional training?

What are the first steps?



## Outcomes

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Were the previous objectives met and what were the results?

What does success look like?

## COLLECTING DATA FROM APPRAISALS

On a scale of 1–5 (1 strongly disagree–5 strongly agree), rate the following statements:

### Individual

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	1	2	3	4	5
I have the chance to use my strengths every day	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have a clear career path in this organisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel rewarded for the work that I do	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Teamwork

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My colleagues are committed to doing quality work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My colleagues help me develop my own skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My colleagues make my own work easier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Organisation

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The mission/vision of our organisation inspires me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our organisation is well prepared for any future changes in our business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



# The criteria of a great appraisal

As a quick reminder, here is the criteria for running a superb appraisal.

## Individual

A good appraisal needs to be personal. Manager need to show authentic interest in every team member and run the appraisal accordingly to each individual's unique needs. As different people and different job roles have different requirements, appraisal process needs to flexible to take that individuality into account.

## Consistent

While studies show that people appreciate frequent conversations, a good appraisal at a set time each year is better than a haphazard talk every now and then. Employees should know what to expect from the appraisal, whether it's run once a year or once a week.

## Fair

It's surprisingly common for managers to give similar values to almost everyone, which can be detrimental for your data quality. Also, managers rating tendencies tend to differ: some are harsh and some lenient. Take these into account.

## Discussion-driven

Employees thoughts and suggestions should truly be heard, and they should drive the whole conversation. An appraisal is not a one-way feedback session, where the manager reviews past performance based on a never-ending list of questions. There should be room for open feedback and cheering both ways.

## Forward-looking

At the end of the day, an appraisal should always be a starting point for something new. An appraisal is successful, when an individual sees the next ambitious yet achievable level that they should build their skills and career towards. Managers should thus direct the conversation towards future development, not just past performance.

For more detailed advice on running appraisals, have a look at **Make Appraisals Work – A Handbook for HR Professionals**



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