

# Annual Performance Review Template

KPI & Competency-Based Evaluation | HR Kingsman — Arseel Nasher, MBA, SHRM-SCP

■ Complete all sections based on the full review period. The employee should complete a self-assessment before the manager review. Final scores must be discussed face-to-face before sign-off.

## ■ EMPLOYEE INFORMATION

| Employee Name   |  | Employee ID   |  |
|-----------------|--|---------------|--|
| Job Title       |  | Department    |  |
| Direct Manager  |  | Review Period |  |
| Date of Joining |  | Review Date   |  |

## ■ RATING SCALE

| Score | Rating               | Description                                                                 |
|-------|----------------------|-----------------------------------------------------------------------------|
| 5     | Outstanding          | Consistently and significantly exceeds all goals. Role model for peers.     |
| 4     | Exceeds Expectations | Frequently exceeds goals. Strong contributor with high quality output.      |
| 3     | Meets Expectations   | Consistently achieves all goals and meets all requirements.                 |
| 2     | Below Expectations   | Partially achieves goals. Improvement required in key areas within 90 days. |
| 1     | Unsatisfactory       | Does not meet minimum requirements. Formal PIP to be initiated immediately. |

## ■ SECTION 1 — KPI PERFORMANCE (Weight: 50%)

| KPI Description   | Target | Actual Result | Score (1–5) | Manager Comments |
|-------------------|--------|---------------|-------------|------------------|
| KPI 1:            |        |               |             |                  |
| KPI 2:            |        |               |             |                  |
| KPI 3:            |        |               |             |                  |
| KPI 4:            |        |               |             |                  |
| KPI 5:            |        |               |             |                  |
| SECTION 1 AVERAGE |        |               |             |                  |

## ■ SECTION 2 — CORE COMPETENCIES (Weight: 30%)

| Competency                           | Self Score (1–5) | Manager Score (1–5) | Evidence / Examples |
|--------------------------------------|------------------|---------------------|---------------------|
| Communication & Interpersonal Skills |                  |                     |                     |
| Problem Solving & Decision Making    |                  |                     |                     |

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| Competency                      | Self Score (1–5) | Manager Score (1–5) | Evidence / Examples |
|---------------------------------|------------------|---------------------|---------------------|
| Teamwork & Collaboration        |                  |                     |                     |
| Initiative & Ownership          |                  |                     |                     |
| Adaptability & Learning Agility |                  |                     |                     |
| Leadership (where applicable)   |                  |                     |                     |
| SECTION 2 AVERAGE               |                  |                     |                     |

■ SECTION 3 — VALUES & BEHAVIOUR (Weight: 20%)

| Value / Behaviour            | Score (1–5) | Observed Examples |
|------------------------------|-------------|-------------------|
| Integrity & Ethics           |             |                   |
| Accountability & Ownership   |             |                   |
| Customer / Stakeholder Focus |             |                   |
| Continuous Improvement       |             |                   |
| SECTION 3 AVERAGE            |             |                   |

■ OVERALL PERFORMANCE SCORE

| Section                        | Weight | Section Score | Weighted Score |
|--------------------------------|--------|---------------|----------------|
| Section 1 — KPI Performance    | 50%    |               |                |
| Section 2 — Core Competencies  | 30%    |               |                |
| Section 3 — Values & Behaviour | 20%    |               |                |
| FINAL OVERALL SCORE            | 100%   |               |                |

■ DEVELOPMENT GOALS FOR NEXT REVIEW PERIOD

| Development Area | Agreed Action Plan | Support Required | Target Date |
|------------------|--------------------|------------------|-------------|
| 1.               |                    |                  |             |
| 2.               |                    |                  |             |
| 3.               |                    |                  |             |

■ EMPLOYEE COMMENTS

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■ SIGNATURES

| Role              | Name | Signature | Date |
|-------------------|------|-----------|------|
| Employee          |      |           |      |
| Direct Manager    |      |           |      |
| HR Representative |      |           |      |