**Mid-Year Performance Review Template Example**

**Employee Information**

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| **Employee Name** | **Employee ID** | **Review Period**  | **Date of Review** |
| Carmen Robertson | EMP-03712 | January 1, 20XX – June 30, 20XX | July 10, 20XX |
| **Position or Title** | **Department** | **Reviewer Name** | **Reviewer Title** |
| Customer Support Specialist | Customer Service | Devon Gomez | Customer Service Manager |

**Current Role**

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| **Job Title** | **Key Responsibilities** | **New Tasks or Role Adjustments Since Last Six Months** |
| Customer Support Specialist | Handling customer inquiries, troubleshooting issues, maintaining customer satisfaction | Began mentoring new hires, assisted in revising help desk documentation |

**Performance Ratings**

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| **Quality** | **Needs Improvement** (1) | **Below Expectations** (2) | **Meets Expectations** (3) | **Exceeds Expectations** (4) | **Outstanding** (5) | **Score** |
| Work Quality |  |  | ✔ |  |  | 3 |
| The Pace of Progress Toward Goals |  |  | ✔ |  |  | 3 |
| Problem-Solving and Decision-Making |  |  |  | ✔ |  | 4 |
| Adaptability and Learning |  |  |  | ✔ |  | 4 |
| Collaboration and Teamwork |  |  |  | ✔ |  | 4 |
| Communication and Responsiveness |  |  | ✔ |  |  | 3 |
| Creativity and Innovation |  | ✔ |  |  |  | 2 |
| Accountability and Initiative |  |  | ✔ |  |  | 3 |
| Attendance and Punctuality |  |  |  | ✔ |  | 4 |
| Workplace Behavior and Engagement |  |  |  | ✔ |  | 4 |
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| **Total Score** |  |  |  |  |  | **34/50** |

**Mid-Year Performance Summary**

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| **Strengths Observed in the First Six Months** | **Challenges or Areas to Address** |
| Strong problem-solving and decision-making skills | Needs to develop more innovative approaches to customer interactions |
| Excellent teamwork and adaptability to shifting customer demands | Should work on proactive communication with team leads |
| Reliable and engaged in workplace culture | Could take more initiative in handling escalated cases |

**Previously Set Goals and Progress**

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| **Goal** | **Progress Made?** | **Notes** |
| Reduce average customer resolution time by 10%. | Yes | Improved by 12% through better use of knowledge base resources. |
| Take on a mentorship role for new hires. | Yes | Successfully mentored three new team members. |
| Enhance technical knowledge of internal systems. | No | Completed half of the required training; needs additional learning time. |

**Updated Goals for the Next Six Months**

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| --- | --- | --- | --- |
| **Goal** | **Adjustments Needed** | **Additional Support Required** | **New Target Date** |
| Improve proactive communication with leadership. | Schedule weekly check-ins with team leads. | Guidance from manager | October 15, 20XX |
| Develop more creative problem-solving techniques. | Attend advanced customer service training sessions. | Training budget approval | December 1, 20XX |
| Take ownership of escalated customer issues. | Work closely with senior specialists to develop best practices. | Shadowing senior reps | November 30, 20XX |

**Long-Term Readiness and Planning**

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| --- | --- |
| **Employee’s Key Contributions So Far** | **Areas to Focus on Before Year-End** |
| Improved resolution time, increased team collaboration, and helped mentor new hires | Strengthening independent decision-making and creative approaches to customer concerns |
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**Pre-Approval Discussion**

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| **Discussion Topic** | **Key Takeaways** |
| Mid-Year Performance Insights | Carmen excels in problem-solving and teamwork, but further development in innovation and communication will enhance her growth. |
| Any Additional Training or Coaching Needed? | Advanced customer service training and senior rep shadowing will support goal achievement. |
| Employee’s Perspective on Their Progress | Carmen feels confident but acknowledges the need for more initiative in escalations and leadership communication. |

**Comments and Approval**

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| --- | --- |
| **Additional Reviewer Comments** | **Employee Comments** |
| Carmen has shown significant growth in her problem-solving and adaptability. Focusing on independent decision-making and communication with leadership will help take her performance to the next level. | I appreciate the feedback and will consciously try to be more proactive in escalated situations and leadership discussions. |
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| **Approved by Reviewer?** | **Reviewer Initials** | **Approved by Employee?** | **Employee Initials** |
| Yes | DG | Yes | CR |

**Signatures**

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| --- | --- | --- | --- |
| **Employee Signature** | **Date** | **Reviewer Signature** | **Date** |
| Carmen Robertson | July 10, 20XX | Devon Gomez | July 10, 20XX |

**Mid-Year Performance Review Template**

**Employee Information**

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| --- | --- | --- | --- |
| **Employee Name** | **Employee ID** | **Review Period**  | **Date of Review** |
|  |  |  |  |
| **Position or Title** | **Department** | **Reviewer Name** | **Reviewer Title** |
|  |  |  |  |

**Current Role**

|  |  |  |
| --- | --- | --- |
| **Job Title** | **Key Responsibilities** | **New Tasks or Role Adjustments Since Last Six Months** |
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**Performance Ratings**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Quality** | **Needs Improvement** (1) | **Below Expectations** (2) | **Meets Expectations** (3) | **Exceeds Expectations** (4) | **Outstanding** (5) | **Score** |
| Work Quality |  |  |  |  |  |  |
| The Pace of Progress Toward Goals |  |  |  |  |  |  |
| Problem-Solving and Decision-Making |  |  |  |  |  |  |
| Adaptability and Learning |  |  |  |  |  |  |
| Collaboration and Teamwork |  |  |  |  |  |  |
| Communication and Responsiveness |  |  |  |  |  |  |
| Creativity and Innovation |  |  |  |  |  |  |
| Accountability and Initiative |  |  |  |  |  |  |
| Attendance and Punctuality |  |  |  |  |  |  |
| Workplace Behavior and Engagement |  |  |  |  |  |  |
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| **Total Score** |  |  |  |  |  |  |

**Mid-Year Performance Summary**

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| --- | --- |
| **Strengths Observed in the First Six Months** | **Challenges or Areas to Address** |
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**Previously Set Goals and Progress**

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| --- | --- | --- |
| **Goal** | **Progress Made?** | **Notes** |
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**Updated Goals for the Next Six Months**

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| **Goal** | **Adjustments Needed** | **Additional Support Required** | **New Target Date** |
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**Long-Term Readiness and Planning**

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| --- | --- |
| **Employee’s Key Contributions So Far** | **Areas to Focus on Before Year-End** |
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**Pre-Approval Discussion**

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| --- | --- |
| **Discussion Topic** | **Key Takeaways** |
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**Comments and Approval**

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| **Additional Reviewer Comments** | **Employee Comments** |
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| --- | --- | --- | --- |
| **Approved by Reviewer?** | **Reviewer Initials** | **Approved by Employee?** | **Employee Initials** |
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**Signatures**

|  |  |  |  |
| --- | --- | --- | --- |
| **Employee Signature** | **Date** | **Reviewer Signature** | **Date** |
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