Performance Review Phrase Bank

Replace every [bracket] with a specific example, result or date. Pick one or two phrases per competency, not five. Phrases marked 'needs improvement' should always be paired with the expected standard and the support offered.

QUALITY OF WORK: EXCEEDS EXPECTATIONS

- [ ] Consistently delivers [work type] with an error rate of [x%], the lowest on the team this year.
- [ ] Catches problems before they reach customers; for example, [specific issue] in [month] saved [time or cost].
- [ ] Sets the standard others use: [document or process] they built is now the team reference.

QUALITY OF WORK: MEETS EXPECTATIONS

- [ ] Produces accurate, complete [work type] that rarely needs rework.
- [ ] Follows [process or checklist] reliably and asks before taking shortcuts.
- [ ] Met the [x%] quality target in [n] of [n] months.

QUALITY OF WORK: NEEDS IMPROVEMENT

- [ ] [n] of [n] [reports / orders / tickets] reviewed in [period] needed correction, mainly for [issue]. The standard is [target].
- [ ] Would benefit from using [checklist or tool] before submitting; we agreed to [action] by [date].
- [ ] Accuracy dropped after [change]; let's set a goal of [target] by [date] with [support].

PRODUCTIVITY AND RELIABILITY

- [ ] Exceeds: Delivered [n] [units] per [period] against a target of [n], while keeping quality at [x%].
- [ ] Exceeds: Took on [extra responsibility] during [busy period] without missing a deadline.
- [ ] Meets: Hits deadlines and keeps stakeholders informed when priorities change.
- [ ] Meets: Attendance and schedule adherence are consistently within standard.
- [ ] Needs improvement: Missed [n] of [n] deadlines this half, most often on [type of task]. We will review priorities weekly to plan around this.
- [ ] Needs improvement: Schedule adherence averaged [x%] against a [y%] standard; we have agreed on [action].

COMMUNICATION

- [ ] Exceeds: Explains complex [topic] clearly to non-specialists; [stakeholder] cited their [presentation / write-up] as the reason [decision] moved forward.
- [ ] Exceeds: Raises risks early and in writing, with options rather than only problems.
- [ ] Meets: Responds to messages within agreed times and keeps updates short and clear.
- [ ] Meets: Listens well in meetings and summarizes decisions accurately.
- [ ] Needs improvement: Updates on [project] often arrived after deadlines had passed. Going forward, flag risks at least [n] days ahead.

- [ ] Needs improvement: Emails to [audience] sometimes leave out the action needed; try leading with the request in the first line.

TEAMWORK AND COLLABORATION

- [ ] Exceeds: Trained [n] new hires on [skill]; all reached proficiency in [time].
- [ ] Exceeds: Regularly steps in to cover peers and shares credit for team results.
- [ ] Meets: Works well with [teams] and handles disagreement respectfully.
- [ ] Meets: Shares knowledge when asked and keeps shared documents up to date.
- [ ] Needs improvement: Peers have reported difficulty getting [information] on time. Let's agree on a handoff routine with [team].
- [ ] Needs improvement: Tends to work alone on [task type] where earlier input would have avoided rework, as in [example].

CUSTOMER FOCUS

- [ ] Exceeds: Customer satisfaction scores averaged [x] against a team average of [y].
- [ ] Exceeds: Resolved [difficult case] by [action], and the customer [renewed / wrote in to praise them].
- [ ] Meets: Handles customer requests courteously and follows up as promised.
- [ ] Needs improvement: [n] escalations in [period] related to [issue]; we will practice [skill] in coaching sessions.

PROBLEM SOLVING AND INITIATIVE

- [ ] Exceeds: Identified the cause of [problem] and proposed [fix], which cut [metric] by [x%].
- [ ] Exceeds: Improves processes without being asked; [example] is now standard practice.
- [ ] Meets: Works through routine problems independently and escalates the right issues.
- [ ] Needs improvement: Often waits for direction on [type of issue] that is within their authority. Next step: decide and inform me afterward.

LEADERSHIP AND PEOPLE MANAGEMENT

- [ ] Exceeds: Team [retention / engagement score / output] improved from [x] to [y] under their leadership.
- [ ] Exceeds: Gives specific, timely feedback; all direct reports have current development plans.
- [ ] Meets: Holds regular one-on-ones and addresses performance issues promptly.
- [ ] Meets: Communicates company changes clearly and answers team questions honestly.
- [ ] Needs improvement: [n] of [n] direct reports did not have a mid-year conversation. Set a schedule for the second half.
- [ ] Needs improvement: Delegates tasks but not decisions; [example] stalled waiting for approval.

ADAPTABILITY AND LEARNING

- [ ] Exceeds: Learned [new system] ahead of rollout and became the go-to person for the team.
- [ ] Meets: Adjusted to [change] quickly and kept output steady during the transition.
- [ ] Needs improvement: Has not yet completed [training] due [date]; we have blocked time on [day] each week.

SELF EVALUATION PHRASES (FOR EMPLOYEES)

- [ ] My biggest contribution this period was [result], which led to [impact].
- [ ] I met [n] of my [n] goals. The one I missed was [goal] because [reason]; next period I will [action].
- [ ] I improved at [skill] by [action], and the result was [evidence].
- [ ] Something I want to get better at is [skill]; support that would help is [training / project / mentor].
- [ ] Feedback I received this year that changed how I work: [feedback and what I changed].
- [ ] Next period I would like to take on [responsibility or project].

OVERALL SUMMARY PHRASES

- [ ] [Name] had a strong year, especially in [area]; the main focus for next year is [area].
- [ ] [Name] reliably meets the expectations of the role, with clear strength in [area].
- [ ] [Name] has made progress on [area] since [date] but has not yet reached the standard for [area]. Our plan is [plan].