# **Quarterly Performance Feedback Template**

**Introduction**

This quarterly review emphasizes short-term results and timely feedback to keep performance on track throughout the year​.

|  |  |  |  |
| --- | --- | --- | --- |
| **Employee Name** |  | **Manager Name** |  |
| **Position/Role** |  | **Review Period** |  |
| **Department** |  | **Date of Review** |  |

## **Section 1: Role & Responsibilities**

Summarize the employee’s key responsibilities during this quarter and evaluate their execution.

**Key Responsibilities this Quarter**

*[List the employee’s main duties or projects for the quarter, highlighting any specific focus areas]*

|  |  |
| --- | --- |
| **Main Duties and Key Responsibilities** | **Focus Area** |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

**Performance Summary (Manager’s Feedback)**

*[Manager’s comments on how well the employee fulfilled their role and responsibilities this quarter]*

|  |
| --- |
|  |

## **Section 2: Core Competencies & KPI Metrics**

Evaluate performance in core competency areas for the role.

|  |  |
| --- | --- |
| **Core Competencies** | **Rating (1-5)** |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |
| 5. |  |

## **Section 3: Key Achievements**

*[List the employee’s key achievements along with measurable results or KPIs to track performance.]*

**Achievement 1**  *[Describe a significant achievement or goal completed]*

|  |
| --- |
|  |

## 

**Achievement 2** *[Describe another important achievement]*

|  |
| --- |
|  |

## 

**Achievement 3** *[Describe additional achievements, if any]*

|  |
| --- |
|  |

## **Section 4: Immediate Areas for Improvement & Support Needs**

Identify any performance gaps or areas for improvement to address in the short term, and note what support or resources are needed.

|  |  |
| --- | --- |
| **Area of Improvement** | **Support Needed** |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

## **Section 5: Short-Term Development Goals & Action Items**

*[Set 1–3 specific development goals or action items for the next quarter, with a plan and timeline.]*

**Goal 1:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Target Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |
| --- |
| **Action Plan** |
| 1. |
| 2. |
| 3. |

**Goal 2:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Target Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |
| --- |
| **Action Plan** |
| 1. |
| 2. |
| 3. |

**Goal 3:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Target Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |
| --- |
| **Action Plan** |
| 1. |
| 2. |
| 3. |

## **Section 6: Employee Self-Assessment**

*[Employee to provide a brief self-reflection on their performance this quarter. A concise self-assessment of their achievements, challenges, and overall performance for the quarter]*

**Employee Comments**

|  |
| --- |
|  |

## **Final Summary & Signatures**

|  |  |
| --- | --- |
| **Employee Overall Rating (1–5)** |  |

|  |
| --- |
| **Rating Scale Legend (1–5):**  **1 – Unsatisfactory:** Performance does not meet expectations; significant improvement needed.  **2 – Needs Improvement:** Below expectations in key areas; some improvement required.  **3 – Meets Expectations:** Satisfactorily meets job requirements and objectives.  **4 – Exceeds Expectations:** Often exceeds job requirements; performance frequently goes beyond expectations.  **5 – Outstanding:** Far exceeds all expectations; consistently exceptional performance. |

**Manager Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Employee Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_