



PERFECT PHRASES FOR PERFORMANCE APPRAISALS

Below you will find the performance factors listed in the performance appraisal with phrases listed under each performance level. These phrases can be used to get you started when describing the level of performance for your employee.

Job Knowledge		
Exceeds Expectations	Meets Expectations	Below Expectations
Understands all aspects of job	Level of job knowledge appropriate to perform tasks required	Needs to learn more to perform job satisfactorily
Strong level of job knowledge	Understands X and Y very well	Often runs into situations where he doesn't know what to do
Knowledge exceeds what is required to perform well	Maintains knowledge through seminars and courses	Is out of date with knowledge
	Knows most of the systems necessary to succeed	Needs to improve job knowledge
	Keeps up-to-date through reading industry periodicals	Does not have the job knowledge to know what to do

Quality of Work		
Exceeds Expectations	Meets Expectations	Below Expectations
Exceeded target by ___% last year	Ordinarily achieves target deadlines and sales quotas	10% below target last two years
Effective at dealing with obstacles	Produces well without slowing others down	Lacks a few skills needed to increase production
Suggested ways for everyone to increase quantity of output	Takes on challenge of difficult quotes	Has not volunteered for skill upgrades
Contributes to profit margin	Produces ___ items per month	Output sometimes affected when under stress

Productivity		
Exceeds Expectations	Meets Expectations	Below Expectations
Above-average productivity	Produces within standards	Quantity is acceptable, but quality is low
Has helped others improve productivity	Accurate and diligent producer	Distracted by trivial unessential issues
Frequently above standards in production	Meets production goals while keeping quality high	Speed is good, but accuracy is hurting overall rates
Maintains safety and quality	Handled 140 calls on average, per month	Needs to increase his/her productivity rates
Completed all four projects at a cost 12% below budget	Conducted five training days a month with reps in the Northeast region	Generally produces well, but needs to maintain his/her machines better for fewer breakdowns

Record Keeping/Documentation		
Exceeds Expectations	Meets Expectations	Below Expectations
Streamlined many procedures	Files and finds documents with ease	Loses essential data occasionally
Administers accounts payable and receivable without error	Has all the administrative skills required	Some records can't be found or are inaccurate
Administers many functions without error	Maintains important records	Sometimes does not maintain records
Thorough, reliable, and accurate	Writes clear memos	Reports are lost on occasion
Maintains vital information and sets priorities well	Uses software effectively	Rarely relies on the computer to simplify tasks

Reliability		
Exceeds Expectations	Meets Expectations	Below Expectations
Delivers on promises far more than not	Appropriate level of accountability	Fails to accept accountability for missed deadlines
High level of accountability for projects	Delivers on promised deadlines	Does not accept accountability for project failures
Does not disappoint when deadlines are tight	Adheres to policies and guidelines	Does not follow directions or instructions
Performs most work independently	Conscientious worker	Does not take action or make decisions without direction
Delivers ___ of ___ completed reports on time	Follows directions and instructions	Has missed deadlines ___ times

Adaptability		
Exceeds Expectations	Meets Expectations	Below Expectations
Has mastered different approaches to situations and can flexibly respond when it is required	Gracefully accepts changes to work	Resists changes
Able to shift focus rapidly	Will reset priorities as required	Argues against resetting priorities
Willingly assumes others' tasks in case of absences	Adjusts to changes in procedure fairly well	Becomes agitated when asked to work outside the daily routine
Accommodates others' needs first	Often changes schedule to meet production deadlines	Frequently will not change mind, despite new evidence

Initiative		
Exceeds Expectations	Meets Expectations	Below Expectations
Takes initiative frequently and appropriately	Takes initiative when appropriate	Does only what's asked
Is above the norm in showing initiative	Comfortable making decisions to solve customers' problems	Slow to act
Does not shy away from taking risks	Likes limits specifically spelled out, but goes to them willingly	Rarely shows initiative
Without instruction, negotiated lower rates with ___ of ___ vendors	Will take risks to accommodate customers	Does not make decisions without approval
Redesigned existing software to solve serious customer service issue	Created a project oversight committee and its mission statement with minimal direction	Not yet confident enough to make decisions

Attendance		
Exceeds Expectations	Meets Expectations	Below Expectations
Consistently arrives to work early	Arrives to work on time	Takes longer breaks than appropriate
Good attendance	Attendance satisfactory	Arrives late at least one day a month
Has rarely missed work due to illness	Only misses work due to verified illness	Has missed work without prior notification 10 times this year
Arrives at least 15 minutes early every day	Leaves home early on inclement days to arrive on time	Consistently uses all sick days
Has missed only two days because of illness	Has not used more than allotted sick days	Has arrived ___ times late by ___ minutes or more

Relationships with Others		
Exceeds Expectations	Meets Expectations	Below Expectations
Seeks first to understand	Does not make inappropriate comments	Does not always listen carefully
Corrects others without being offensive	Sense of humor appropriate	Quick to lose patience
Assertive but does not offend	Gets along well in most situations	Sometimes tells inappropriate jokes
Open to improving interpersonal skills	Communicates with others well	Does not use skills in emotionally charged situations
Works well with others from all different backgrounds	Maintains composure well	Body language and words do not always match

Customer Service		
Exceeds Expectations	Meets Expectations	Below Expectations
Has won us customer loyalty many times	Usually competent and professional with customers	Gets annoyed by customers with a lot of questions
Graceful and tactful under pressure from customers	An able representative	Sometimes gets sarcastic
Customer relations a strength	Courteous and knowledgeable	Presents a sloppy and uncaring image
Always patient, competent, and professional with customers	Professional presentation	Customer relation skills need improvement
Solves customer problems with speed and accuracy	Manages all but the most challenging customer situations	Conducts personal phone conversations while customers wait

Adhere to Policies and Procedures		
Exceeds Expectations	Meets Expectations	Below Expectations
Understands the influences on decision making very well	Sufficiently understands processes	Still learning the workflow
Uses knowledge of big picture to guide actions	Knows how interactions with his/her department affects the rest of the organization	Unfamiliar with a few basic procedures
Thinks about the policies and procedures when making decisions	Follows policies and procedures	Still learning his/her way around
Reviews new and updated policies	Understands the organization's purpose	Needs to learn about organizational policies and procedures
Helps internal customers interpret the policies as requested		

Planning and Analytical Ability		
Exceeds Expectations	Meets Expectations	Below Expectations
Good planning and analytical skills	Detail oriented	Needs to develop skills to analyze situations
Analysis shows insight	Possesses the skills to solve basic on the job problems	Frequently draws wrong conclusions from data
Methodical analyst	Analyzes data and makes appropriate recommendations	Does not do detailed analysis
In six production failures, made a diagnosis and repair within two hours	Summarizes reports from five supervisors in time for Monday managers' meetings	Analysis sometimes focuses on the unimportant
Communicates analysis results clearly to others		Analytic results are often questioned by others

Managerial Skills		
Exceeds Expectations	Meets Expectations	Below Expectations
Models desired behavior for staff	Maintains personnel and financial records as required	Micromanages many employee activities
Mastered and uses basic coaching skills	Plans normally appropriately	Has used threats to move employees
Rarely needs to use formal disciplinary action	Regularly informs superiors of progress/problems	Employee turnover rate higher than the average
Processes normally operate well with few problems	Usually achieves goals and objectives	Employee sick time higher than average without reason
Plan well	Effective participant in hiring process	Does not understand how to plan

Mentoring of Others		
Exceeds Expectations	Meets Expectations	Below Expectations
Invests time during all appraisals on personal development	Gives employees advanced training and additional responsibilities	Insufficient training has led to poor productivity
Has an "open door" policy	Develops employees appropriately	Fails to develop staff in needed areas
Reinforces and supports new employee orientation	Regularly shares management information during staff meetings	Does not appropriately develop staff to perform needed duties
Uses delegation well to develop staff	Every employee in the department received some type of professional development training	Department suffered a 10% error rate due to inadequate training
Excellent role model for continuous learning		

Communication Skills		
Exceeds Expectations	Meets Expectations	Below Expectations
Good written and verbal communication skills	Can explain complicated procedures well	Speaks in monotone
Is convincing and confident when speaking	Rarely fumbles for an answer	Is not confident when presenting
Speaks articulately and concisely	Can express him/herself clearly in written communication	Uncomfortable responding to questions
Uses resources when unsure of proper spelling, punctuation, or grammar	Spelling usually correct	The point of a written communication not always clear
E-mails and memos are clear and to the point	Writes professional communications including e-mail	Hard to understand focus in written communications

Resource:
Perfect Phrases for Performance Reviews by Robert Bacal and Douglas Max.
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