



Performance Review Prep Kit

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Performance Review Prep Kit

Make reviews faster, fairer, and more effective.

This kit gives you the templates, timelines, and workflows to run structured performance reviews your team will actually appreciate.

1. Performance Review Timeline (Recommended)

Use this timeline to prepare, run, and follow up on reviews without last-minute scrambling.

4–6 Weeks Before Review

- Align leadership on company and team-level goals.
- Confirm who's participating in reviews this cycle.
- Share goals, expectations, and timelines with managers and employees.

3 Weeks Before Review

- Launch a structured self-reflection process (form or async doc).
- Encourage employees to reflect on:
 - Wins and progress
 - Challenges and blockers
 - What they've learned
 - Where they want to grow next

2 Weeks Before Review

- Managers begin review write-ups, pulling insights from:
 - Weekly updates or check-ins
 - OKRs / project outcomes
 - Peer feedback (if applicable)
 - 1:1 notes

1 Week Before Review

- Finalize write-ups
- Review with leadership / People Ops if needed
- Schedule and confirm meetings

Review Week

- Hold review conversations
- Keep discussions focused on:
 - Progress
 - Impact
 - Growth and goals for next cycle

1 Week After Review

- Summarize next steps and align on goals for the next period
- Share feedback summaries with employees
- Kick off next cycle OKRs or growth plans

2. Self-Reflection Template (for Team Members)

Use this as a lightweight async doc or form. Encourage reflection, not perfection.

Your Wins:

What are you most proud of this cycle? What went well?

Challenges:

What felt hard? Where did you get stuck?

Outcomes:

How did your work contribute to the team or company's goals?

Growth:

What skills or behaviors have you improved? What would you like to work on next?

Support:

Is there anything you need more or less of from your manager, team, or the company?

3. Performance Review Template (for Managers)

Keep things structured and consistent. Add examples where relevant.

Summary of Contributions:

What did this person accomplish this cycle? Focus on impact and outcomes, not just activity.

Strengths:

What do they do exceptionally well?

Areas for Growth:

Where is there room to develop further?

Next Steps:

What goals or focus areas should we set for the next cycle?

Manager Notes (Private):

Use this space to note context for calibration, comp, or follow-ups.

4. Frameworks for Fast-Growing Teams

You can mix and match based on company size and maturity.

Goals-Based Reviews (Best for Startups with OKRs)

- Start with a review of OKRs or key initiatives
- Map progress to outcomes
- Tie feedback to work that actually moved the business forward

Growth-Based Reviews

- Focus on personal and professional growth
- Use prompts around skill-building, leadership, and impact

Peer Input-Only Reviews

- Use anonymous peer feedback (1–3 teammates) as the primary input
- Great for flat orgs or early-stage teams

5. Quick Checklist

Before you launch your next review cycle:

- Are your goals and expectations clear at the org + team level?
- Are managers prepared and supported?
- Does everyone know when and how reviews will happen?
- Is feedback tied to real work (not memory)?
- Are next steps documented and actionable?

Try OKRs Tool for Your Team

Running great performance reviews starts with tracking real work—*as it happens*.

With **OKRs Tool**, your team's contributions, progress, and outcomes are captured automatically through weekly async check-ins, so you're not starting from scratch at review time.

- Reflect actual work—not memory
- Tie updates directly to team and company goals
- Give managers a full timeline of contributions
- Build performance reviews into your workflow—without extra tools

[Start free for teams of up to 10 →](#)

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