

Goal-Setting Template

Set measurable goals the review can be scored against

OBJECTIVE

OBJECTIVE — THE OUTCOME YOU WANT THIS CYCLE

e.g. New enterprise customers activate faster

KEY RESULTS

KEY RESULT 1

measurable outcome

BASELINE → TARGET

34% → 60%

OWNER

one name

KEY RESULT 2

measurable outcome

BASELINE → TARGET

34% → 60%

OWNER

one name

KEY RESULT 3

measurable outcome

BASELINE → TARGET

34% → 60%

OWNER

one name

CYCLE

START DATE

END DATE

REVIEW DATE

THE TEST FOR EVERY KEY RESULT

Can it be marked done without a number moving? If yes, it is a task — rewrite it as the outcome the task should produce.

Weekly Check-In Template

The monitoring stage — 15 minutes, same time each week

WEEK OF

OWNER

FOR EACH KEY RESULT

KEY RESULT

STATUS R/A/G

PROGRESS %

BLOCKER / NEXT STEP

THE FOUR QUESTIONS

1. What moved? 2. What is at risk? 3. Priority this week? 4. Where do we need help?

Keep it to 15 minutes. Teams that check in weekly complete 43% more of their goals.

Continuous Feedback Log

Capture feedback as it happens — tied to the work, not the annual review

Log praise, constructive notes, and requested input against a specific goal and date. This is the record the review reads from.

DATE	TO / FROM	TYPE praise / note / requested	TIED TO GOAL	FEEDBACK

PUBLIC PRAISE, PRIVATE NOTES

Post praise publicly to reinforce the behaviour; keep constructive notes private to keep the conversation honest.

Performance Review Template

A rating built on the record — delivery plus behaviour, in one view

EMPLOYEE

REVIEWER

CYCLE

1 — GOAL DELIVERY

KEY RESULT

TARGET

ACTUAL

WHAT DROVE THE RESULT

2 — COMPETENCIES

SELF SCORE

3 — STRENGTHS

backed by evidence

MANAGER SCORE

4 — GROWTH AREAS

with an example

PEER AVERAGE

5 — NEXT CYCLE FOCUS

1–2 commitments

OVERALL RATING — POINT TO THE EVIDENCE

Every score should point to a specific outcome. Only 27% of leaders could defend every rating with goal evidence.

1:1 Meeting Template

The ongoing manager-report conversation that keeps the record current

DATE

MANAGER

REPORT

WINS SINCE LAST TIME

what went well, worth recognising

BLOCKERS

what is in the way, what support is needed

GOAL PROGRESS

where the key results stand this week

DEVELOPMENT

growth, skills, next-role conversation

ACTION ITEMS

who does what by when