

Why you should be using an employee evaluation form

Employee evaluation forms provide a systematic way for managers to give workers feedback about their performance levels. Such communication clearly spells out strengths and weaknesses, thus serving as both a motivational tool and as a guide to where to direct improvement efforts.

Here, we look at the importance of a thoughtful employee evaluation form and its contribution to the overall employee performance review process:

What is an employee evaluation form?

An employee evaluation form is a company-standardized document a manager fills out to rate various aspects of a worker's job performance. Areas frequently covered include competency at role-specific tasks, industry knowledge, quality of work, attitude, professionalism, and ability to work with others.

Judgment may be quantitative in nature, such as assigning a numerical ranking on a scale of 1 (low) to 5 (high). This method allows comparison among employees in similar positions by examining total score or by determining an individual's average (adding the ratings and dividing by the total number of entries).

Some employers choose to use simple descriptions rather than numbers. For instance, the evaluator places a checkmark for each action or behavior in the appropriate column under "excellent," "good," "satisfactory," or "unsatisfactory." Besides specific information, this method creates an overall picture by noting where the majority of checkmarks fall.

Many employee reviews include opportunities for expanded input. This space allows an explanation of ratings, such as citing specific examples of inadequate performance or briefly talking about times the person exceeded expectations. Such information helps the employee know what he is particularly doing right or wrong.

The benefits of using an employee evaluation form

While a manager could conduct an employee performance review without the aid of an employee evaluation form, using one offers a variety of advantages. Benefits include:

- **Structuring conversation.** Instead of having to think on one's feet or worry that you'll forget to cover an area, an employee evaluation form provides an outline of talking points during your face-to-face meeting.
- **Consistency among staff members.** A leader who "wings" an employee review runs the risk of being charged with bias or favoritism because of what she does or doesn't cover. An employee evaluation form helps ensure workers get evaluated in a standard manner on the same criteria.
- **Emergence of trends.** A comprehensive look at the employee pinpoints where the person excels and where he requires improvement. For instance, a pattern of low scores on items related to professionalism

and interpersonal relationships may signal the need for some soft skills training.

- **Everyone on the same page.** An employee's view of his performance may not match the manager's opinion. By clearing up misperceptions, both sides know where things stand and can take measures to better define what's expected.
- **A written record.** An employee evaluation form signed by both manager and employee acknowledges that an employee performance review took place and serves as a point of reference. This paper trail helps support future HR decisions, such as promotion or termination.

Creating an employee evaluation form

Companies develop employee evaluation forms that suit their individual needs and style. However, forms often contain similar elements. The Internet contains a wealth of samples, many of which can be customized. Members of the [Society for Human Resource Management](#) also have access to the organization's downloadable templates.

Most employee evaluation forms begin with a section stating the employee's name and position, the date, and the person conducting the review. Following this is a brief, clear description of the rating system.

Items to be judged make up the bulk of the employee evaluation form. Depending on the number created, these entries may be listed together or placed into groups based on a theme, such as a section devoted to attitude.

Most sheets include space for elaboration. Some employee evaluation forms also contain a few pointed, open-ended questions such as "What is this person's top strength?" or "What can this employee do to be more effective?"

Many businesses use the employee review process as an opportunity to look forward and include a section on goals for the upcoming year or suggestions for professional development. Such information aids the employer in developing a stronger staff and the individual in obtaining support for career objectives.

Employees do not always agree with assessments. A section in which they can express their feelings encourages their involvement in the review process and promotes reflection.

The very end of the document should contain a space for all parties to sign and date. These signatures serve as an official acknowledgment that the employee performance review took place.

Using an employee evaluation form in a performance review and beyond

In most cases, a face-to-face meeting accompanies an employee evaluation form. The written review serves as a checklist of what topics to cover and as a springboard for discussion.

Companies should keep a signed copy of the employee evaluation form in the worker's file. Managers also should give the employee a copy of his records. These actions ensure both sides can access the information at any time. Cases may arise where employers and employees want to refer back to it, such as when a higher company role opens up or when trying to remember what training route had been decided upon.

When another annual review rolls around, previous forms prove useful. Comparisons between past evaluations and current performance show progress (or lack of it) over time.

Managers, however, may not want to wait until the formal review time to revisit the document. A periodic refresher keeps objectives top of mind, and consistent feedback promotes employees staying engaged and on track.