

Start Here

Free Employee Performance Review Starter Kit

A useful record for one review

Use the kit to prepare evidence, hold a two-way performance discussion, agree future goals and support, and keep a clear record. It is designed for one employee and one review at a time.

What is included

Excel workbook with five sheets; editable Word review form; printable A4 and US Letter forms; this guide; and a short AI performance review guide. The Excel workbook includes the optional AI Review Prompt Builder.

Choose your starting point

Use Excel for structured notes and up to eight goals/actions. Use Word for an editable final record. Use PDF if you prefer to print and handwrite. There is no automatic transfer between formats.

Keep a blank original

Extract the ZIP, then save a separate workbook or Word copy for each review. Use an appropriate secure filename and follow your organisation's access and retention policies.

Six simple steps

1. Enter details. 2. Gather evidence. 3. Draft and discuss. 4. Agree goals/actions. 5. Optionally use the prompt builder. 6. Complete and store the agreed record.

Prepare and Discuss

Run a review grounded in work evidence

Before the review

Confirm the review period and the role's agreed responsibilities. Gather completed work, relevant goals, specific results and dated examples. Ask the employee for their perspective. Avoid relying on one recent event or unverified comments.

Record achievements and strengths

Describe what happened and why it mattered. Example: "Delivered the September campaign on schedule; the approved report recorded 120 qualified enquiries." Keep evidence separate from interpretation.

Discuss development

Use specific examples, describe the expected standard and ask about context. Include the support needed. Example: "Two handovers lacked a delivery checklist. Agree a checklist and a manager review before the next campaign."

Make it a two-way discussion

Walk through achievements, strengths and development. Ask what helped, what was difficult and what support would make a difference. Record corrections and the employee's comments. Do not pre-fill their agreement.

Complete the workbook review

Use the amber input cells in PERFORMANCE REVIEW. Finish the manager summary after discussion, record agreed priorities, and set a next review/check-in date. This kit does not calculate a rating or employment decision.

Goals and Follow Up

Turn the conversation into measurable next steps

Use one item per row

GOALS & ACTIONS has eight rows. Choose Performance Goal, Development Goal, Training, Manager Support or Follow-Up Action. Use the Type and Status dropdowns; enter a short description and success measure.

Name an owner and dates

Agree who is responsible, when the action starts, its target date and a review/check-in date. Put context and support in Notes. Enter real dates in the date columns.

Make the measure usable

Fictional example: "Complete a campaign handover checklist before launch." Measure: "Checklist reviewed by the manager before the next campaign." Agree the owner and actual dates together.

Update progress deliberately

Enter an estimated percentage such as 25%. Choose status manually: Not Started, In Progress, Completed, On Hold or Cancelled. Neither a progress percentage nor a completed action is an automatic performance rating.

Follow up

At the check-in, review evidence, barriers and support. Record agreed changes. If the goal or deadline changes, explain why in Notes. Keep this review's workbook together with its final record.

Optional AI Support

Build a prompt, then verify the draft

Prepare minimised context

AI is optional. Nothing is transmitted automatically. Follow your organisation's AI/privacy policy. Use an approved AI tool and placeholders; avoid unnecessary identifiable, confidential or sensitive information.

Use the Excel builder

Open AI REVIEW PROMPT. Enter job title, review period, achievements, strengths, development areas, notes and future goals. These fields do not automatically copy from the review. Keep each input to 1,200 characters or fewer. Choose tone and output type.

Copy the generated cell

Select cell A34 and copy it with Ctrl+C (Mac: Command+C). Paste into your approved AI tool. Copy the cell text, not the formula. The browser builder on Mercer Lane Press assembles the same framework locally.

Role plus Task plus Context plus Output

Role sets the perspective. Task names the job. Context supplies verified facts. Output specifies the format. Safeguards require missing facts to become questions and prohibit invented evidence or employment decisions.

Review before use

Check every claim against your evidence. Remove invented metrics, dates, employee comments or agreements. Check tone and fairness. Agree goals, dates and support with a person. Route consequential material through the review required by policy.

Your Final Record

Choose the format and know the boundary

Word or PDF

The Word form is editable. Expand writing space as needed and check page breaks before printing. The PDF forms contain the same sections with writing space. Choose A4 or US Letter and print at actual size; do not shrink to fit a different paper size.

Acknowledgement

A signature or acknowledgement confirms that the review was discussed and received. It does not mean agreement with every assessment. Record corrections and different views in Employee comments.

Workbook support

Use Excel desktop for the workbook. Amber inputs are editable while sheet protection is on. The workbook is macro-free and has no external connections. Other spreadsheet apps require their own verification. For maintenance, see HELP FAQ.

Limits

This is a general HR productivity resource, not legal, employment-law or jurisdiction-specific compliance advice. Adapt it to organisation policy and local requirements. Obtain qualified HR or legal review where appropriate. AI output is always a draft.

Need a complete HR management system?

The HR Manager Toolkit + AI Productivity System adds employee records, dashboards, review-cycle tracking, one-to-ones, recruitment and candidate comparison, onboarding and 30/60/90 plans, cases, training, skills, leave, a calendar, an actions register, 48 HR prompts, prompt chaining, guided workflows and 22 editable HR forms.

Want the complete AI method?

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