

Self-evaluation template

Fill this in before your performance review. Use facts: what you did, what changed, and how you know.

Name

Role

Review period

Manager

1. My main results this period

List 3. For each: what you did, what changed, how you know.

2. How I worked with others

3. What I learned

4. What was hard, and what I would do differently



5. Goals for next period

Goal	How I will measure it	Support I need

Fill in the [brackets] with your own facts.

Results and achievements

A result. This year I delivered [project], which [result for the team or customer]. I did this by [what you did].

A goal met. I met my goal of [goal]. The part I am most pleased with is [detail].

A goal missed. I did not meet my goal of [goal]. The main reason was [reason], and next time I will [change].

A process improved. I changed how we handle [task]. It now takes [time] instead of [time].

Work beyond the role. I also took on [extra work] when [reason], and completed it by [date].

Teamwork

Helping others. I helped [colleague] with [task] when they were short of time. The team finished [project] on schedule.

Working across teams. I worked with [team] on [project]. I set up a weekly call that stopped the delays between us.

Sharing knowledge. I ran a short session for the team on [topic]. People have been using [what they learned] since.

Supporting a new starter. I supported [name] during their first month, and they are now working on their own.

Taking feedback. [Name] told me my updates were too long. I now send a 3-line summary and attach the detail.

Communication

Clarity. I have worked on making my updates short. Colleagues have told me they are easier to read.

A hard conversation. I raised the problem with [issue] early, and we found a solution before it affected the customer.

Presenting. I presented [topic] to [audience]. I prepared 3 slides, and the group made a decision in the meeting.

Listening. I have made a habit of asking a question before giving my view in meetings.

Customers. I handled [number] customer queries a week and received [feedback].

Learning and development

A new skill. I learned [skill] this year by [course or practice], and I now use it for [task].

From a mistake. I made an error in [task]. I told my manager the same day, we fixed it, and I added a check to stop it happening again.

From feedback. I asked [name] for feedback on [work]. Their advice on [point] changed how I do [task].

Stretching. I took on [harder task] for the first time. It was difficult at first, and by the end I could do it without help.

What I want to learn. Next year I would like to learn [skill], because it would help me [reason].

Goals for next year

A specific goal. My main goal for next year is [goal], which I will measure by [measure].



Support needed. To do this, I would like [training, time or access].

A stretch goal. I would like to lead [project] by [date].

A habit. I will ask for feedback every month instead of once a year.

Team contribution. I would like to help [new starter or team] with [task].