No. 13

Performance Review Toolkit

Run fair, evidence-based performance reviews: weighted competencies by role, ratings backed by written examples, a calibration view across reviewers, and development goals with review dates.

Built for: General managers, department heads and HR leads running annual or mid-year reviews for hourly and supervisory teams.

What is included

File	Format	Use
Performance-Review-Workbook-Blank.xlsx	Excel	Start here: formatted, formula-ready workbook for your own data.
Performance-Review-Workbook-Sample.xlsx	Excel	Same model filled with fictional sample data.
Performance-Review-Toolkit.html	Interactive dashboard	Optional: opens in Chrome, Edge or Safari on a computer or tablet. Runs without internet; data stays in that browser.
performance-review-toolkit-guide.pdf	PDF	This guide.
LICENSE.txt, START-HERE.txt	Text	License terms and quick start.

Quick start

1. **Start with Excel.** Open **Performance-Review-Workbook-Blank.xlsx** and enter your own data in the blue cells; every other cell calculates. The **-Sample** workbook shows a filled-in example.
2. **Use Google Sheets?** In Google Drive choose New › File upload, then open the workbook with Google Sheets. Formulas carry over; charts may need restyling.
3. **Optional interactive dashboard:** open **Performance-Review-Toolkit.html** in Chrome, Edge or Safari on a computer or tablet. It runs offline and opens with fictional sample data — choose **Start blank** when you are ready.
4. The dashboard saves entries only in that browser on that device. Use **Save backup** regularly; **Restore** loads a backup elsewhere.

Operating routine

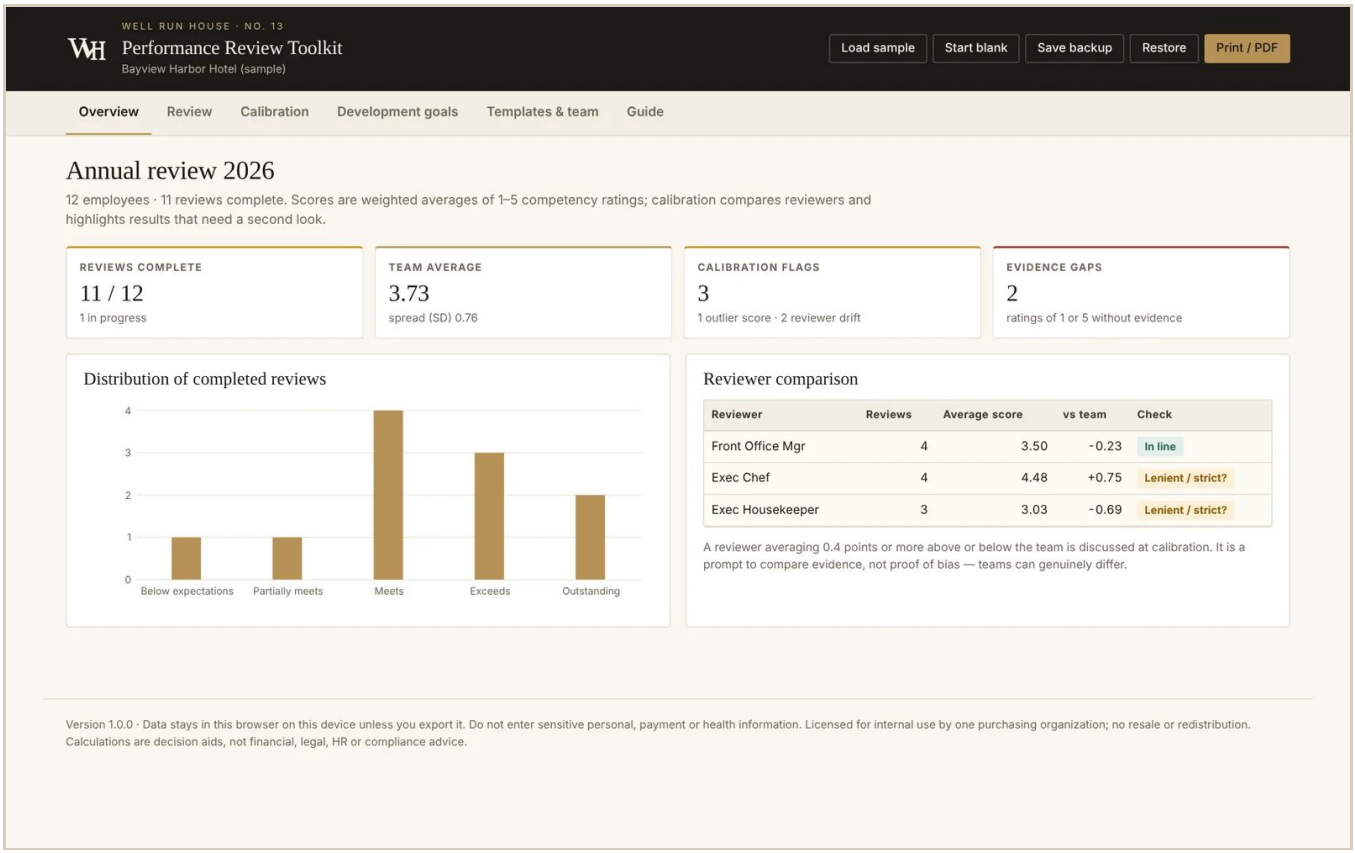
1. **Define role expectations:** 4–6 observable competencies per role, weighted to total 100%.
2. **Gather factual examples** through the period — dates, numbers and observed behaviour.
3. **Rate each competency 1–5.** Any 1 or 5 must cite written evidence.
4. **Calibrate ratings** as a leadership team: outliers, reviewer drift and evidence gaps.
5. **Agree measurable development goals and review dates** with each employee.

Sample — the full product includes the Excel workbook, interactive dashboard and complete guide

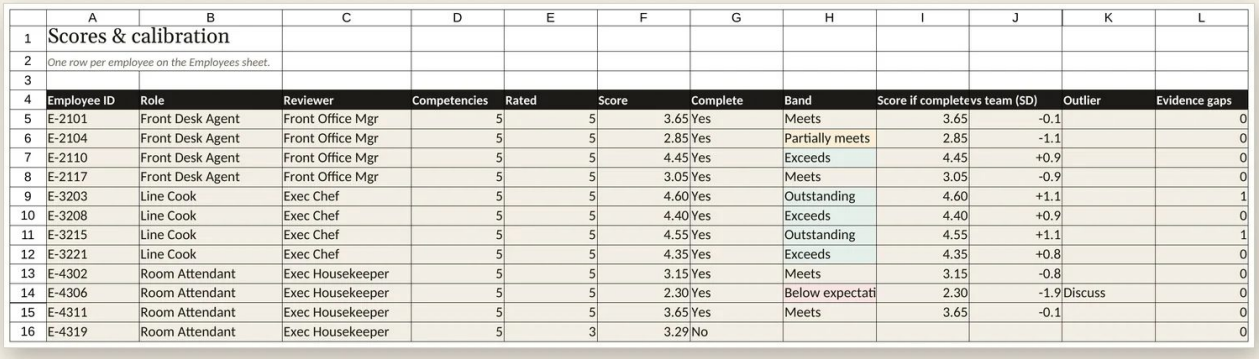
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Performance Review Toolkit

Two screenshots from the product, taken with its fictional sample data.



Interactive dashboard — Review cycle overview



Scores & calibration

One row per employee on the Employees sheet.

	A	B	C	D	E	F	G	H	I	J	K	L
4	Employee ID	Role	Reviewer	Competencies	Rated	Score	Complete	Band	Score if complete	vs team (SD)	Outlier	Evidence gaps
5	E-2101	Front Desk Agent	Front Office Mgr	5	5	3.65	Yes	Meets	3.65	-0.1		0
6	E-2104	Front Desk Agent	Front Office Mgr	5	5	2.85	Yes	Partially meets	2.85	-1.1		0
7	E-2110	Front Desk Agent	Front Office Mgr	5	5	4.45	Yes	Exceeds	4.45	+0.9		0
8	E-2117	Front Desk Agent	Front Office Mgr	5	5	3.05	Yes	Meets	3.05	-0.9		0
9	E-3203	Line Cook	Exec Chef	5	5	4.60	Yes	Outstanding	4.60	+1.1		1
10	E-3208	Line Cook	Exec Chef	5	5	4.40	Yes	Exceeds	4.40	+0.9		0
11	E-3215	Line Cook	Exec Chef	5	5	4.55	Yes	Outstanding	4.55	+1.1		1
12	E-3221	Line Cook	Exec Chef	5	5	4.35	Yes	Exceeds	4.35	+0.8		0
13	E-4302	Room Attendant	Exec Housekeeper	5	5	3.15	Yes	Meets	3.15	-0.8		0
14	E-4306	Room Attendant	Exec Housekeeper	5	5	2.30	Yes	Below expectati	2.30	-1.9	Discuss	0
15	E-4311	Room Attendant	Exec Housekeeper	5	5	3.65	Yes	Meets	3.65	-0.1		0
16	E-4319	Room Attendant	Exec Housekeeper	5	3	3.29	No					0

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