Performance review

Annual or mid-year review for one employee · meeting 45–60 minutes

Example: a fictional engineer at a 300-person fintech. Names and numbers are made up.

01 HOW TO USE THIS FORM

1. Two weeks before: agree the date and share this form.
2. At least 3 working days before: the employee shares the self-assessment. The manager gathers evidence from the whole period and asks 2–4 colleagues for input.
3. In the meeting: the employee speaks first. Then go through goals and competencies, and agree on development and next goals.
4. Within 5 working days: send the final version. The employee adds comments, and both sign.
5. Before you finish: book the first check-in.

02 REVIEW DETAILS

The employee can ask for a copy of this form, and factual errors are corrected on request. Don't record health details or reasons for absence here.

Employee	Sofia Antoniou
Job title and level	Senior Backend Engineer (L4)
Team	Payments
In this role since (optional)	March 2024
Reviewer (manager)	Nikos Georgiou, Engineering Manager
Role expectations	Engineering career framework, Backend L4
Review period	1 January – 31 December 2026
Review type	Annual
Meeting date	14 January 2027
Who sees this form	Stored in the HR system. Visible to Sofia, Nikos and HR. Kept for 3 years after the review.

03 RATING SCALE

Rate results and behaviour across the whole period, not just recent weeks, against the agreed goals and with evidence. If hours, scope or time in the role changed, or adjustments were agreed, rate against goals adjusted for that and record the adjustment, not the reason. Don't rate personality, or anything linked to leave, health, pregnancy, age or other protected characteristics.

Rating	Label	What it means
1	**Below expectations**	Most agreed goals were not met. A clear improvement plan is needed.
2	**Partly meets expectations**	Some goals were met. There are specific gaps to close with support.
3	**Meets expectations**	Agreed goals met at the expected quality. A solid rating, not an average one.
4	**Exceeds expectations**	Results went beyond the agreed goals or were delivered in harder conditions.
5	**Outstanding**	Results far beyond the role, with impact the wider company can see.

N/E	**Not enough evidence**	Too little to go on this period, for example new in the role. Say what evidence you'll collect and by when.

04 GOALS AND RESULTS

If a goal changed during the period, note when and who agreed it, and rate against the updated goal.

Goal for this period	How success was measured	Result and evidence	Rating
Cut p95 latency of the payments API from 420 ms to 250 ms	p95 latency on the production dashboard, monthly average	230 ms since October, after moving card checks to an async queue and adding a read replica	4
Move the billing services to the new event bus	4 services moved, no failed payments during the switch	3 of 4 moved with no failed payments. Goal changed on 6 October, agreed with Nikos: the ledger service moves in Q1 2027 because the PCI audit froze changes in Q4	3
Mentor two mid-level engineers to run on-call on their own	Both handle on-call weeks without escalation	Both on the rota since September. One escalation in six weeks, handled well	3

05 COMPETENCIES

3 means the description fits. For 4–5, give an example beyond it; for 1–2, an example of the gap. A good example says what happened, what the person did, the result and when.

Competency	What good looks like in this role	Examples from this period	Rating
Quality of work	Work is accurate, tested and needs little rework.	No sev-1 incidents from her changes in 2026. Wrote the load tests the team now uses	4
Ownership	Takes responsibility for outcomes, raises risks early, follows through.	Flagged the PCI freeze risk in August and re-planned the ledger move herself	4
Collaboration	Works well across teams, shares knowledge, helps others succeed.	Paired with the Risk team on the async checks. Their lead asked to keep her for the next project	4
Communication	Clear in writing and in meetings. Keeps stakeholders informed.	Design docs are clear. Status updates to Finance were late twice in Q2	3
Growth and learning	Builds the skills the role needs and acts on feedback.	Learned Kafka for the event bus and gave two internal talks	4
Security and compliance	Handles card data and access by the book and keeps audit evidence ready.	Prepared the payments evidence for the PCI audit in September; no findings for her services	4
Leading people (managers only)	Sets clear goals, gives regular feedback, develops the team.	Not applicable	—

06 FEEDBACK FROM OTHERS (OPTIONAL)

Ask 2–4 people who worked closely with the employee. Summarise themes, use roles rather than names, and leave out anything they didn't see first-hand.

From (role)	What they saw first-hand	How collected
Risk team lead	Ran the async card-check rollout together. Clear write-ups of trade-offs; kept Risk informed at each step	Three written questions, November
Mid-level engineer she mentored	Weekly pairing. Explains her decisions and lets others drive	Conversation with the manager, December

07 SELF-ASSESSMENT

The employee shares this with the manager at least 3 working days before the meeting. It is kept with the review.

What went well this period, and what are you most proud of?

The latency project. It was the first time I owned a change across three teams from start to finish.

What was harder than expected, and what did you learn?

Estimating the billing migration. Next time I'll check the compliance calendar before committing to dates.

Did anything outside your control affect your results?

The change freeze for the PCI audit from October to December.

What support do you need from your manager or the company?

Time for a system design course and a mentor from the platform team.

What should your manager start, stop or continue doing?

Start sharing roadmap changes earlier. Continue the weekly one-to-ones.

Where do you want to grow in the next 12 months?

Towards a tech lead role.

08 MANAGER SUMMARY

Main strengths, with examples

Owns hard problems end to end and has strong technical judgement (the latency project). Raises risks early.

Areas to develop, with examples

Keep non-engineering stakeholders informed without being asked. Plan buffers for outside dependencies such as audits.

Overall rating (1–5 or N/E) and how it was reached

4 — Exceeds expectations. Goals count for 60%, competencies for 40%. Calibrated with the other engineering managers on 12 January 2027.

09 DEVELOPMENT PLAN

Not only courses: projects, mentoring, shadowing and stretch tasks count.

What to develop	Actions	Support needed	How we'll know it worked	By when

Leading technical design	Run the design review for the ledger move	Time in the sprint, a mentor from the platform team	Two senior engineers rate the review as useful; decisions written down	March 2027
Updates for stakeholders	Send Finance a short weekly update during the ledger move	Update template from the product manager	No escalations from Finance about missing information	From February 2027

Career interest, in the employee's words (optional)

Tech lead in 2027; interested in platform architecture.

10 GOALS FOR THE NEXT PERIOD

Goal	How success will be measured	Supports (team or company goal, optional)	Due date
Finish moving the ledger service with no failed payments	No failed payments; the old queue switched off	Platform migration 2027	31 March 2027
Bring p99 latency of the payments API under 600 ms	Production dashboard, monthly	Checkout conversion goal	30 June 2027
Act as tech lead for the three-person Payments squad	The squad's quarterly goals met; feedback from the squad	Engineering leadership pipeline	31 December 2027

First check-in

15 April 2027

11 COMMENTS AND SIGN-OFF

If the employee disagrees, they write it under Employee comments and contact [HR contact] within [10 working days].

Was anything in this review new to you?

No.

Employee comments

I agree with the review. I'd like a budget for one conference in 2027.

Pay and promotion

This review is one input into the 2027 pay review under the Engineering pay progression policy (HR handbook, section 4). Promotion readiness is assessed separately against the career framework.

Signatures

Sofia Antoniou, 16 January 2027 Nikos Georgiou, 16 January 2027 Elena Charalambous, Head of Engineering, 17 January 2027

Signing confirms the review was discussed. It does not mean the employee agrees with every point.