



EMPLOYEE EVALUATION WORKSHEET

Employee Name: _____

Position: _____

Date of Evaluation: _____

FINANCIAL

Project Budget Adherence

# assigned		# within budget		Percentage: (within / assigned)	
# months within budget					

Compensation Level

current pay:		standard pay:		Variance: (current / standard)	
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CUSTOMER

Internal Customer Relationships

# positive survey responses		complaints received		Result: (complaints/responses)	
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External Customer Relationships

# positive survey responses		complaints received		Result: (complaints/responses)	
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INTERNAL PROCESSES

Tasks Completed On Schedule

# projects assigned		# completed by deadline		% completed on time (completed/assigned)	
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Task Success Rate

# tasks completed or days worked		# tasks or days without failure*		Success rate: (tasks without failure / tasks completed)	
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Resource efficiency

Planned resources		Actual resources		Efficiency (used / allocated)	
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*Failure defined according to company policy or strategy



Employees Appraisal Form by BSC Designer

LEARNING AND GROWTH

# training opportunities participated in:	
Number of improvement suggestions made:	

ANALYSIS

	Result	Target Values*			Base Result	Weight**	Adjusted Points (Base x Weight)
		Poor / Red	Slow / Yellow	Success / Green	Poor = -1 Slow = 0 Success = 1		
Financial							
Projects w/in budget							
Months w/in budget							
Compensation level							
Customer							
Internal success							
External success							
Internal Processes							
Tasks on-time							
Success rate							
Resource efficiency							
Learning & Growth							
Training participation							
Suggestions offered							
						Total Score	
						Target Value*	

*Target values determined by policy/strategy.

**Weights assigned according to policy/strategy. Weight of 1 = base result, greater than 1 adds weight and less than 1 decreases weight.

NOTES
