

Review Template for Clients and Associates

Instructions: Managers, please fill in relevant criteria for a position and provide to the reviewer for completion.

Team Member Name _____

Evaluation Period _____ Due Date _____

Client Relations	MEETS EXPECTATIONS	DOES NOT MEET EXPECTATIONS

Knowledge Base	MEETS EXPECTATIONS	DOES NOT MEET EXPECTATIONS

Teamwork	MEETS EXPECTATIONS	DOES NOT MEET EXPECTATIONS

Personal Skills	MEETS EXPECTATIONS	DOES NOT MEET EXPECTATIONS

Office Management	MEETS EXPECTATIONS	DOES NOT MEET EXPECTATIONS

Comments

- Offer positive and negative examples of performance.
- Offer examples of character and teamwork.
- How is this team member a role model for others?
- What areas of development do you recommend?

Signature of team member indicates receipt of appraisal. It does not necessarily indicate agreement.

Team Member Signature Date

Supervisor Signature Date