

# Mid-Year Performance Review Template Example

## Employee Information

Employee Name	Employee ID	Review Period	Date of Review
Carmen Robertson	EMP-03712	January 1, 20XX – June 30, 20XX	July 10, 20XX
Position or Title	Department	Reviewer Name	Reviewer Title
Customer Support Specialist	Customer Service	Devon Gomez	Customer Service Manager

## Current Role

Job Title	Key Responsibilities	New Tasks or Role Adjustments Since Last Six Months
Customer Support Specialist	Handling customer inquiries, troubleshooting issues, maintaining customer satisfaction	Began mentoring new hires, assisted in revising help desk documentation

## Performance Ratings

Quality	Needs Improvement (1)	Below Expectations (2)	Meets Expectations (3)	Exceeds Expectations (4)	Outstanding (5)	Score
Work Quality			✓			3
The Pace of Progress Toward Goals			✓			3
Problem-Solving and Decision-Making				✓		4
Adaptability and Learning				✓		4
Collaboration and Teamwork				✓		4
Communication and Responsiveness			✓			3
Creativity and Innovation		✓				2
Accountability and Initiative			✓			3
Attendance and Punctuality				✓		4
Workplace Behavior and Engagement				✓		4
<b>Total Score</b>						<b>34/50</b>

## Mid-Year Performance Summary

Strengths Observed in the First Six Months	Challenges or Areas to Address
Strong problem-solving and decision-making skills	Needs to develop more innovative approaches to customer interactions
Excellent teamwork and adaptability to shifting customer demands	Should work on proactive communication with team leads
Reliable and engaged in workplace culture	Could take more initiative in handling escalated cases

## Previously Set Goals and Progress

Goal	Progress Made?	Notes
Reduce average customer resolution time by 10%.	Yes	Improved by 12% through better use of knowledge base resources.
Take on a mentorship role for new hires.	Yes	Successfully mentored three new team members.
Enhance technical knowledge of internal systems.	No	Completed half of the required training; needs additional learning time.

## Updated Goals for the Next Six Months

Goal	Adjustments Needed	Additional Support Required	New Target Date
Improve proactive communication with leadership.	Schedule weekly check-ins with team leads.	Guidance from manager	October 15, 20XX
Develop more creative problem-solving techniques.	Attend advanced customer service training sessions.	Training budget approval	December 1, 20XX
Take ownership of escalated customer issues.	Work closely with senior specialists to develop best practices.	Shadowing senior reps	November 30, 20XX

## Long-Term Readiness and Planning

Employee's Key Contributions So Far	Areas to Focus on Before Year-End
Improved resolution time, increased team collaboration, and helped mentor new hires	Strengthening independent decision-making and creative approaches to customer concerns

## Pre-Approval Discussion

Discussion Topic	Key Takeaways
Mid-Year Performance Insights	Carmen excels in problem-solving and teamwork, but further development in innovation and communication will enhance her growth.
Any Additional Training or Coaching Needed?	Advanced customer service training and senior rep shadowing will support goal achievement.
Employee's Perspective on Their Progress	Carmen feels confident but acknowledges the need for more initiative in escalations and leadership communication.

## Comments and Approval

Additional Reviewer Comments	Employee Comments
Carmen has shown significant growth in her problem-solving and adaptability. Focusing on independent decision-making and communication with leadership will help take her performance to the next level.	I appreciate the feedback and will consciously try to be more proactive in escalated situations and leadership discussions.

Approved by Reviewer?	Reviewer Initials	Approved by Employee?	Employee Initials
Yes	DG	Yes	CR

## Signatures

Employee Signature	Date	Reviewer Signature	Date
Carmen Robertson	July 10, 20XX	Devon Gomez	July 10, 20XX

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<b>Total Score</b>						

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Employee's Key Contributions So Far	Areas to Focus on Before Year-End

## Pre-Approval Discussion

Discussion Topic	Key Takeaways

## Comments and Approval

Additional Reviewer Comments	Employee Comments

Approved by Reviewer?	Reviewer Initials	Approved by Employee?	Employee Initials

## Signatures

Employee Signature	Date	Reviewer Signature	Date

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