STANDARD OPERATING PROCEDURE

Performance Review SOP

Document no.	SOP-HR-002
Revision	1.0
Owner	HR Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To evaluate employee performance against agreed goals on a consistent schedule, document the outcome, and turn the review into a clear development plan.

2. Scope

Applies to all regular employees during scheduled review cycles and any interim reviews requested by a manager. Day-to-day one-on-ones and disciplinary matters are covered separately.

Definitions

Review cycle	The defined period, such as a half or a full year, that a performance review covers.
Calibration	A meeting where managers compare ratings across their teams to keep scoring consistent before ratings are finalized.
HRIS	The human resources information system used to store goals, ratings and review documents.

3. Responsibilities

Employee	Sets goals, tracks progress, completes a self-assessment and takes part in the review conversation.
Manager	Agrees goals, gathers feedback, writes the assessment, delivers the review and confirms the development plan.
HR Business Partner	Runs the review cycle timeline, facilitates calibration and checks ratings for consistency and bias.

RACI matrix

Activity	Employee	Manager	HR Business Partner
Set and agree annual goals	R	R/A	I
Complete self-assessment	R/A	I	-
Write manager assessment	C	R/A	C
Calibrate ratings across teams	-	R	R/A
Deliver review and development plan	C	R/A	I

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- HRIS or performance management system
- Goal-setting template
- Self-assessment form
- Manager assessment and rating guide
- Calibration tracking sheet
- Development plan template

5. Procedure

Step	Task	Owner	Done
5.1	**Set goals for the cycle** At the start of the review cycle, the employee and manager agree three to six measurable goals and enter them in the HRIS within the first two weeks of the cycle. **Checkpoint:** Goals are specific and measurable, not just a list of duties.	Manager	☐
5.2	**Track progress through the cycle** The manager and employee review goal progress during regular one-on-ones and note any changes to priorities or targets directly in the HRIS.	Manager	☐
5.3	**Open the review cycle** HR opens the review cycle in the HRIS on the published schedule, sets the deadlines for self-assessment and manager review, and notifies all participants.	HR Business Partner	☐
5.4	**Complete the self-assessment** The employee rates their progress against each goal, adds supporting examples, and submits the self-assessment in the HRIS before the deadline.	Employee	☐
5.5	**Collect peer or upward feedback** Where the process includes multi-rater feedback, the manager requests input from relevant peers or stakeholders and reviews it before writing the assessment.	Manager	☐
5.6	**Write the manager assessment** The manager rates each goal, writes specific examples of strengths and areas to improve, and proposes an overall rating in the HRIS. **Warning:** Base ratings on documented performance, not on recent events alone.	Manager	☐
5.7	**Calibrate ratings** The HR business partner facilitates a calibration meeting where managers compare proposed ratings across their teams and adjust any that are inconsistent with the evidence. **Checkpoint:** Ratings are consistent with written evidence before they are finalized.	HR Business Partner	☐
5.8	**Finalize the rating** The manager updates the assessment in the HRIS with the calibrated rating and prepares talking points for the review conversation.	Manager	☐

Step	Task	Owner	Done
5.9	**Hold the review conversation** The manager meets with the employee to discuss the assessment, the rating and the reasoning behind it, and gives the employee time to respond. **Checkpoint:** The employee has a chance to ask questions and add comments before the review is closed.	Manager	☐
5.10	**Agree a development plan** The manager and employee agree specific development actions, such as training or stretch assignments, and record them in the development plan template.	Manager	☐
5.11	**Close and file the review** The manager marks the review complete in the HRIS. HR confirms all reviews for the cycle are signed and archives the records per the records retention policy.	Manager	☐

6. Quality checks

- Every employee has documented goals within two weeks of the cycle opening.
- Self-assessments and manager assessments are complete before calibration.
- Ratings changed at calibration have a documented reason.
- Every completed review has a signed development plan on file.

7. Records

- Goal-setting records for the cycle
- Self-assessment and manager assessment
- Calibration notes and rating changes
- Signed development plan

8. KPIs

- Percentage of reviews completed by the deadline
- Distribution of ratings across the organization
- Percentage of employees with an active development plan
- Employee satisfaction with the review process

9. Common mistakes

- Setting goals so vague that progress cannot be measured.
- Writing the assessment from memory instead of documented examples.
- Skipping calibration for smaller teams.
- Treating the development plan as a formality with no follow-up.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

This is a template. Adapt it to your organization, equipment and local regulations before use.

Scan for the latest version

Opens this template online, where you can download it again in Word, PDF, Excel or CSV — free, no sign-up.

Or add it to Perfect Wiki so your team can find it and ask questions about it in Microsoft Teams, Slack, kChat or Mattermost.