

Balanced scorecard review template



Financial performance

- Revenue generation or cost-saving activities
- Efficient use of resources
- Contribution to financial targets

Customer knowledge

- Understanding of customer needs and expectations
- Contribution to customer satisfaction
- Impact on customer retention or growth

Internal processes

- Efficiency and effectiveness of work processes
- Contribution to process improvements
- Compliance with standard operating procedures and policies

Learning and growth

- Skills and knowledge improvement
- Adaptability to new processes or changes
- Innovative ideas or initiatives

Performance ratings

- Rating for each criterion (using a pre-defined scale, for example, 1-5)
- Examples and justifications for each rating



Overall performance summary

- Overall rating
- Major accomplishments
- Areas for improvement

Future goals and development

- Review of goals set during the previous performance review
- Assessment of progress toward those goals
- Setting new goals for the upcoming period

Employee comments

- Employee's feedback on the review process

