TOOL 5

Quarterly Performance Summary

PURPOSE: *Step back every quarter to assess overall performance and trajectory, and build the record the annual review will rest on.*

Employee: *Enter name*	**Manager:** *Enter name*	**Quarter:** *e.g., Q2 2026*	**Date:** *MM/DD/YYYY*

GOAL ACHIEVEMENT

Goal 1	*Description*
Goal 1 commentary	
Goal 2	*Description*
Goal 2 commentary	
Goal 3	*Description*
Goal 3 commentary	

GOAL STATUS

	Exceeded	Met	Partially Met	Not Met
Goal 1	☐	☐	☐	☐
Goal 2	☐	☐	☐	☐
Goal 3	☐	☐	☐	☐

PERFORMANCE HIGHLIGHTS

Major accomplishment 1	
Major accomplishment 2	
Major accomplishment 3	

AREAS OF GROWTH AND CHALLENGES ENCOUNTERED

Improvement 1	
Improvement 2	
Challenge 1	*What happened and how it was handled*
Challenge 2	*What happened and how it was handled*

DEVELOPMENT PROGRESS

Skill development goals	
Progress	
Next steps	

RATING TRAJECTORY

Last quarter	
This quarter	
Trend	*Improving, Steady, or Declining*

NEXT QUARTER AND CAREER CONVERSATION

Goal 1 for next quarter	
Goal 2 for next quarter	
Goal 3 for next quarter	
Career conversation notes	*Brief notes on career aspirations and progress*

> **Pro Tip:** This summary becomes the foundation for annual performance reviews. Four honest quarterly summaries make the annual review a confirmation, not a surprise.