

Team Performance Review Template

Regular team performance reviews help measure progress, celebrate achievements, and identify opportunities for improvement. This template provides a structured approach to assessing collective performance, ensuring that the team remains aligned, motivated, and accountable.

1. Purpose of This Tool

- ☐ Evaluate overall team performance and results.
- ☐ Identify what is working well and what needs improvement.
- ☐ Strengthen communication, trust, and shared accountability.
- ☐ Recognise collective achievements and contributions.
- ☐ Align team goals with wider organisational priorities.

Tip: The best reviews focus on progress and learning, not blame or fault.

2. Team Overview

Field	Details
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Team Name	
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Department / Function	
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Team Leader	
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Number of Members	
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Review Period	
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Date of Review	
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- ☐ Complete these fields before the review meeting.

Tip: Use this section as the cover page for the team review document.

3. Key Performance Indicators (KPIs)

Performance Area	KPI / Metric	Target	Actual	Result (Met / Not Met)	Notes
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Productivity

Quality

Customer Satisfaction

Efficiency

Collaboration

Innovation

☐ Record key measures to provide an objective performance overview.

Tip: Use consistent metrics that are understood and relevant to all team members.

4. Achievements and Highlights

Category	Achievement	Impact	Recognised By
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Delivery

Innovation

Teamwork

Customer Feedback

☐ Celebrate wins to build motivation and reinforce positive behaviour.

Tip: Recognition of collective success strengthens unity and morale.

5. Challenges and Lessons Learned

Challenge	Cause	Impact	Lesson Learned
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☐ Discuss challenges openly and identify constructive takeaways.

Tip: Focus on learning and prevention, not fault or blame.

6. Collaboration and Culture Review

Category	Statement	Rating (1–5)	Comments
Communication	Information flows clearly within the team.		
Trust	Team members rely on each other to deliver.		
Inclusion	All voices are heard and valued.		
Conflict Management	Disagreements are handled respectfully.		
Recognition	Good work is acknowledged promptly.		

☐ Review how team dynamics support or hinder performance.

Tip: Culture drives outcomes — improving communication and trust increases results.

7. Process and Efficiency Review

Process Strength Area for Improvement Suggested Action Owner

☐ Identify which processes enable or restrict productivity.

Tip: Encourage team input — those closest to the work know where waste occurs.

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8. Skills and Capability Review

Skill Area	Current Level	Desired Level	Development Action	Owner	Timeline
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Technical Skills					
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Communication					
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Leadership					
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Collaboration					
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Problem-Solving					
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☐ Assess capability gaps and plan development priorities.

Tip: Build team development plans, not just individual ones.

9. Improvement and Action Plan

Focus Area	Improvement Action	Responsible Person	Deadline	Progress
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Process Efficiency				
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Collaboration				
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Communication				
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Innovation				
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☐ Agree clear, measurable next steps and assign ownership.

Tip: Keep the list short and realistic — small wins build lasting change.

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10. Team Reflection Questions

Question

Reflection

What did we achieve that we are most proud of this period?

What challenges slowed us down, and how did we handle them?

What could we do differently next quarter to perform even better?

How well are we living up to our team values?

What support do we need from leadership to succeed?

☐ Encourage open discussion and collective ownership of outcomes.

Tip: Reflection transforms reviews from analysis into growth.

11. Follow-Up and Review Dates

Action Owner Review Date Status Notes

☐ Track agreed actions and ensure accountability post-review.

Tip: Schedule a follow-up within 30 days to maintain momentum.

12. Summary and Sign-Off

Reviewer

Role Signature Date

Team Leader

Team Members (Collective Sign-Off)

☐ Capture agreement and commitment to improvement actions.

Tip: Shared ownership ensures progress between reviews.

How to Use This Template

Use this template during quarterly or bi-annual reviews to assess overall team health and performance. Encourage participation from all members, focusing on results and relationships equally. Combine it with the Peer Accountability Tracker and Continuous Improvement Checklist for a complete performance management process.

Notes