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Title

Creating an employee
performance scoreboard in Excel

Agenda

- Introduction
- Purpose of a performance scoreboard
- Importance of performance scoreboard
- How it's used
- Conclusion

INTRODUCTION

An MS Excel scorecard summarizes the organization's performance by showing key performance indicators and quality standards for those metrics. When creating a scorecard, you typically set overall objectives, including various performance targets for a group or organization

Employee performance rating card dashboard
This dashboard provides real-time updates on employee performance data, and is designed to be user-friendly.

Free employee performance review templates
These templates provide a snapshot of employee performance and can include a section for comments and additional notes.

Employee Engagement Scorecard

Indicator	Desired Trend	Current Trend	Baseline 2012	Q1 2013	Q2 2013	Q3 2013	Q4 2013	2013 Q Average	Q1 2014	Q2 2014	Q3 2014	Q4 2014	2014 Q Average
Integrity													
Absenteeism (PTO-U) (HR)	↓	↓	11,192.00	13,978	7,754	9,061	8,267	9,765	15,284	6,433	8,457	7,770	9,486
Turnover rate for < 1yr of service (HR)	↓	↑	1.43%	1.06%	0.92%	0.7%	0.78%	0.92%	1.30%	1.1%	0.88%	1.18%	1.12%
Turnover rate for introductory period (90 days) (HR)	↓	↓	.08%	0.06%	0.00%	0.17%	0.05%	0.06%	0.00%	0.06%	0.05%	0.16%	0.03%
Commitment													
How well staff work together for care of patients (PG)	↑	↑	87.00%	86.20%	89.60%	87.60%	88.30%	87.93%	87.90%	90.30%	89.60%		89.27%
Turnover Rate Hospital Wide-Voluntary Only (HR)	↓	↑	4.44%	3.68%	3.63%	3.01%	2.79%	3.24%	3.03%	4.12%	4.04%	4.56%	4.24%
Community Service Hours (PR)	↑	↑	6,208	19,231					24,684				
Percentage of employees who contribute to United Way (HR)	↑	↑	20.00%			21.00%					20.00%		
Accountability													
Overall professional Appearance (PG)	↑	↑	89.00%	88.60%	89.30%	88.20%	90.10%	89.05%	90.40%	91.60%	90.30%		90.77%
Employee Rounding by Managers (SM) * ~	↑	↓	63.00%	61.00%	67.00%	62.58%	N-D	63.53%	53.06%	58.4%	70.30%	N-D	60.59%
Number of Survey Respondents (SM) *	↑	↓	271	372	342	318	N-D	344	408	250	293	N-D	317
Active in decision making for my department (SM) * ~	↑	↓	51.00%	56.00%	53.00%	46.23%	N-D	51.74%	46.18%	46.00%	53.90%	N-D	48.68%
Comfortable discussing/reporting safety issues in my department (SM) * ~	↑	↓	84.00%	89.00%	88.00%	88.30%	N-D	88.45%	79.09%	79.20%	82.6%	N-D	80.30%
Respect													
Courtesy and Respect (PG)	↑	↑	87.00%	87.00%	88.00%	87.51%	84.52%	86.76%	88.45%	82%	84.3%		84.38%
Reward and Recognition (SM) * ~	↑	↑	31.00%	37.00%	39.00%	31.13%	N-D	35.71%	33.30%	40.4%	41.6%	N-D	38.43%
Manager responds timely and constructively to my concerns (SM) * ~	↑	↓	64.00%	65.00%	64.00%	69.81%	N-D	66.27%	52.12%	58%	65%	N-D	58.34%
Excellence													
Overall Rating HCHAPS (PG)	↑	↓	58.00%	54.40%	62.00%	56.70%	57.80%	57.73%	55.50%	58%	60.1%		56.23%
Proud to work at CCMC (SM) * ~	↑	↓	53.00%	58.00%	58.00%	61.01%	N-D	59.00%	34.11%	45.2%	51.9%	N-D	43.74%
Communication/Department Meetings (SM) * ~	↑	↓	51.00%	52.00%	61.00%	54.72%	N-D	55.91%	47.30%	52.4%	75.1%	N-D	58.27%
Initial On boarding of employees (GHO/ET)	↑		4.42	4.31	4.63	4.48	4.34	4.44	4.36	4.12	4.33	4.43	4.31

HR - Human Resources
GHO/ET - General Hospital Orientation Evaluation Tool (Range 1-5)

PG - Press Ganey
PR - Performance Reviews
SM - Survey Monkey

You can create an employee performance score board in Excel using a variety of templates and tools, including:

Excel performance review templates: These templates can help you evaluate employees on specific criteria, such as productivity, communication skills, and efficiency. They can also include maximum points and sections for comments and notes.

Employee performance rating card dashboard: This dashboard provides real-time updates on employee performance, and is designed to be easy to use for people with varying levels of Excel proficiency.

Importance

Improve communication
An employee scorecard helps employees and managers understand the shared goals they are working towards.

Unite departments
When all departments use the same scorecard, it helps everyone work together to meet business goals.

Identify weak areas
A scorecard can help organizations identify areas that need improvement.

Motivate employees
A scorecard can motivate employees to take ownership of their career path and personal development.

Highlight performance
You can use conditional formatting to highlight top or bottom performers.

Identify challenges
A performance chart can help you identify obstacles affecting your business's productivity.

Employee Evaluation Scorecard to Review Performance

Employee Name:	John Foe
Employment Start Date:	Mm/dd/XXXX
Job Title:	Coordinator
Department:	Research
Review Period Start:	June
Review Period End:	September
Last Review Date:	Mm/dd/XXXX
Reviewer Name:	Robin Smith
Reviewer Title:	Reporting Manager

Performance Competencies					
Communications	1	2	3	4	5
Expresses ideas and thoughts verbally	1	2	3	4	5
Expresses ideas and thoughts in written form	1	2	3	4	5
Keeps others informed on time	1	2	3	4	5
Add text here	1	2	3	4	5
Add text here	1	2	3	4	5
Cooperation	1	2	3	4	5
Establishes and maintains effective relations	1	2	3	4	5
Offers assistance to coworkers	1	2	3	4	5
Disciplined behavior	1	2	3	4	5
Add text here	1	2	3	4	5

How it's used

•Use a template
There are many templates available online for employee performance reviews and scorecards. These templates can include sections for employee information, performance goals, key performance indicators (KPIs), and performance ratings.

•Add items to a scorecard
You can use PerformancePoint Dashboard Designer to add items to a scorecard, such as KPIs and metrics. You can add KPIs from different data sources to the same scorecard.

•Create a performance review
You can create a performance review in Excel by including cells for an employee's name, job role, and review date at the top of the spreadsheet. You can then include an evaluation section below that. The evaluation section can include metrics that are specific to your business and role.

•Collect feedback
You can collect feedback from peers, yourself, and the employee for an annual or biannual review. Peer reviews can help you get a more holistic picture of an employee's performance.

Conclusion

To conclude an employee performance scoreboard in Excel effectively, you should summarize the key findings and provide actionable insights. Here's a structured approach

By presenting these elements, you can provide a clear, actionable overview of employee performance and make informed decisions to enhance overall productivity and satisfaction.

THANK YOU