

Performance & Development Review

Performance Review Rating - (Read carefully before proceeding)

The following rating table has been designed to assist in reviewing your performance and development needs on a range of issues.

The numerical rating system is used to highlight any differences between your perception of your performance and that of your Manager. The aim is to pinpoint areas that require attention.

Both parties must use common sense and logic in application of the rating scale.

6 - Exceptional	Can be relied upon to always exceed standards or quality requirements of the position
5 - Very Good	Always meets, sometimes exceeds, standard of quality requirements of position
4 - Good	Always meets standards or quality requirements
3 - Satisfactory	Usually meets standards or quality requirements
2 - Unsatisfactory	Rarely meets standard or quality requirements, needs to lift performance
1 - Unacceptable	Doesn't meet minimum standards or quality requirements, performance must improve
N/A - Not applicable	Statement does not relate to staff member's position and level of responsibility

NB: Where considered appropriate or necessary, evidence to support a rating should be noted to support your assessment.

Performance Review:

Questions	Staff Member	Manager	Agreed Position
Communication - Listens intently and is sensitive to the other persons point of view			
Presents verbal communications in a clear manner – gets the point across effectively			
Answers the phone in a clear, pleasant and courteous manner projecting a professional initial point of contact			

Uses appropriate level of written communications to accurately convey the intended message			
Skilled and efficient in various keyboarding skills that are necessary for the position held			
Presentation & Attendance - Overall appearance is appropriate for our company standards			
Punctual and conscious of good time keeping - Good attendance record			
Customer Service - Takes responsibility in dealing with issues			
Provides prompt, efficient and courteous service to colleagues and clients			
Looks for opportunities to improve the services provided to internal and external contacts			
Financial & Business Awareness - Is aware of, and understands the commercial and financial consequences of decisions and actions			
Possesses and applies the financial skills necessary in carrying out responsibilities appropriate to the position			
Group Dynamics & Teamwork - Able to deal with difficult interpersonal situations to a satisfactory resolution			
Able to apply enthusiasm and motivation in order to achieve team harmony and performance goals			
Carries out regular business related formal and/or informal communication with other team members			
Leadership, management and supervision (managers & supervisors only) Self-motivated and prepared to take the lead			
Shows resourcefulness and responsibilities in anticipating and addressing various situations			

Understands and practices the concept of leadership with team members			
Follows up and revives the effectiveness of decisions			
Manages themselves and other effectively to meet set targets			
Demonstrates skills in providing individual assistance, counselling and guidance			
Managing Performance - Aware of personal strengths, acknowledges areas for improvement			
Achieves a high level of speed and accuracy in meeting personal, Departmental or Business Unit performance targets			
Performs effectively even when under pressure and remains calm and unflustered			
Works productively and is clearly aware of own contribution to business objectives			
Focuses clearly on work objectives and is not easily distracted			
Works to an effectively designed plan of work at the personal and departmental level			
Delegates work effectively and appropriately to ensure on-time performance			
Grasps new ideas and concepts readily			
Recognises potential problem areas and brings solutions to the attention of management staff or other staff			
Other:			

Summary:

In summary, rate the individual's overall performance in the following areas on the scale of 1 to 6

Communication	
Presentation and attendance	
Customer service	
Financial and business awareness	
Group dynamics and teamwork	
Leadership/management/supervision	
Managing performance	

Overview:

Based on your review so far, the following analysis should be considered carefully and as comprehensively as possible

What went right in the previous year and what were the contributing factors toward success?
How can individual strengths be enhanced during the review period?
What are your areas for improvement?
How do you propose to achieve these improvements?
What do you want to achieve in the coming year in this Company?

Identified Development Needs

An Action Plan should be completed in consultation with the Manager and the Staff Member.

Any development needs to be identified from the Review discussion, and a decision taken as to the most appropriate course of action. These actions might include (but are not limited to) the following:

- Formal training
- On-the-job training
- Coaching
- Counselling



- Project assignment
- Mentoring

It is important to ensure that action be taken in a timely fashion and that agreed plans, in any form, are followed up on a regular basis to ensure on-the-job application of skills developed.

Individual Development Strategy

In the next 12 months, what should each individual do to improve performance?

- Enhancing strengths
- Addressing weaknesses
- Taking advantage of opportunities

What milestones should the individual hope to reach in the next?

- 3 months
- 6 months
- 12 months

Notes and/or observations

Action Plan

Competency to be developed	Proposed Action (This may take the form of formal training, on-the-job training, coaching counselling, project assignment, etc.)	Review Dates



Employee Signature:

Date:

Manager Signature:

Date: