

A quick start guide – read first.

This template provides us with a powerful tool to deliver our strategy and align everyone's objectives with the organisation's values & business KPI's.

The goal is to enable our group to maximise their performance – as individuals, teams and as an organisation. To be the best version we can be for our clients and as work colleagues.

It also provides the business with a rating for each of you that allows us to benchmark and distribute bonuses, pay rises and promotions accordingly.

Because this is new and some may not have done this before, it's very normal to have lots of questions, so please feel free to ask questions or see your respective manager if you are unsure.

The process will roll over from year to year and will get easier and flow better once you have used this template for the first 12 months.

Ideally, each section should be populated with a few dot points or paragraphs from you and your manager.

Section 1, 2 & 3 = What you have done in the last year to help us WIN

Section 5 = What you are going to do in the coming year to help us WIN

Atchison - F23 Team Reviews

NAME	
POSITION	
COMMENCEMENT DATE	

1. OUTLINE ALL YOUR OBJECTIVES BELOW

*Note: Your objectives will have been identified at the senior management level - using the 4 objectives outlined in the strategic planning process. These are Financial / Client / Operational / Growth
These then provide the framework for each team member to tighten their objectives as agreed with your manager at the beginning of the review year to clearly outline what you will be assessed against.*

2. SELF-ASSESSMENT OF PERFORMANCE AGAINST EACH AGREED OBJECTIVE

For each of your listed objectives, state whether you believe you've **exceeded** the expectation, **met** the expectation or feel your performance has been **below** expectation. A list of all value descriptors can be found below.

*You must provide comments, particularly where you've rated yourself as **exceeding** the expectation or to justify why you feel your performance has been **below** expectation. Complete highlighted section only.*

OBJECTIVE 1	1. OBJECTIVE 1.	2. SELF-ASSESSMENT EXCEEDS / MEETS / BELOW EXPECTATION	MANAGER'S ASSESSMENT EXCEEDS / MEETS / BELOW EXPECTATION	MANAGER'S RATING E.g. (Exceeds, Meets or Below expectation) As it is mid year you may not have achieved all objectives, but if it is on track
Financial Achieve Revenue Targets for FY.				

				consider that meeting.
OBJECTIVE 2 Client Deliver a Client Experience: 8+/10	1. OBJECTIVE 	2. SELF-ASSESSMENT EXCEEDS / MEETS / BELOW EXPECTATION	MANAGER'S ASSESSMENT EXCEEDS / MEETS / BELOW EXPECTATION	MANAGER'S RATING E.g. (Exceeds, Meets or Below expectation) As it is mid year you may not have achieved all objectives, but if it is on track consider that meeting.
OBJECTIVE 3 Operational Execute using all tools within the business	1. OBJECTIVE 1.	2. SELF-ASSESSMENT EXCEEDS / MEETS / BELOW EXPECTATION	MANAGER'S ASSESSMENT EXCEEDS / MEETS / BELOW EXPECTATION	MANAGER'S RATING E.g. (Exceeds, Meets or Below expectation) As it is mid year you may not have achieved all objectives, but if it is on track consider that meeting.
OBJECTIVE 4 Growth Actively pursue growth.	1. OBJECTIVE 	2. SELF-ASSESSMENT EXCEEDS / MEETS / BELOW EXPECTATION	MANAGER'S ASSESSMENT EXCEEDS / MEETS / BELOW EXPECTATION	MANAGER'S RATING E.g. (Exceeds, Meets or Below expectation) As it is mid-year you may not have achieved all objectives, but if it is on track consider that meeting.

3. SELF-ASSESSMENT OF PERFORMANCE AGAINST OUR VALUES & BEHAVIOURS

For each of our values and behaviours below, state, whether you believe you've exceeded on the value/behaviour, **met** the value/behaviour or feel your performance on value/behaviour has been **below** expectation.

You may also wish to provide comments, particularly where you've rated yourself as **exceeded** on the value/behaviour or to justify why you feel your performance on the value/behaviour has been **below** expectation.

Guide: Exceeds - Almost exclusively demonstrates the below - can almost always rely on them to do the below (a very rare exception that they don't) Meets - Consistently demonstrates the below – most often rely on them to do the below (perhaps a few exceptions that they haven't) Below – Regularly fails to demonstrate the below	SELF-ASSESSMENT Comments must be written to support your assessment.	MANAGER'S ASSESSMENT Comments must be written to support your assessment	MANAGER RATING Final agreed rating between self and manager
1. WE DON'T DO BEIGE	EXCEEDS / MEETS / BELOW	EXCEEDS / MEETS / BELOW	EXCEEDS / MEETS / BELOW
2. WE WILL BE INNOVATIVE	EXCEEDS / MEETS / BELOW	EXCEEDS / MEETS / BELOW	EXCEEDS / MEETS / BELOW

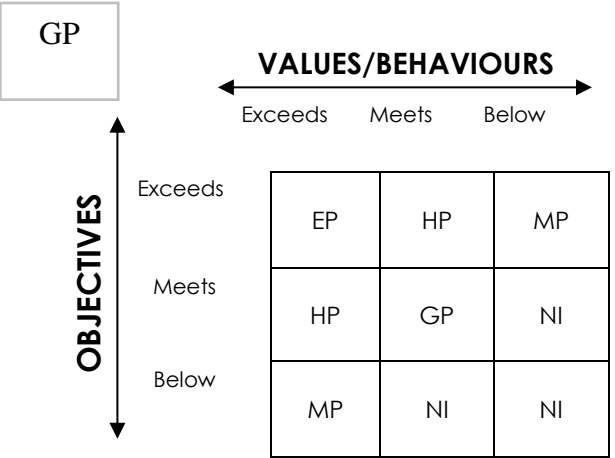
3. WE WILL OUTWORK THE REST	EXCEEDS / MEETS / BELOW	EXCEEDS / MEETS / BELOW	EXCEEDS / MEETS / BELOW
4. WE WILL DO IT AS A TEAM	EXCEEDS / MEETS / BELOW	EXCEEDS / MEETS / BELOW	EXCEEDS / MEETS / BELOW

4. DETERMINE A PERFORMANCE RATING

9-SQUARES is used at the Year-End review to facilitate a complete balanced review of your overall performance. It ensures that your performance rating measures 'WHAT' you did (objectives) and 'HOW' you did it (WAATCOIN VALUES & Behaviours)

Discuss and agree with your manager an appropriate performance rating that most accurately reflects your performance against your Objectives and WAATCOIN core values. Please indicate in square below both the rating (e.g., HP) and number of box.

- EXCELLENT PERFORMANCE (EP): Consistently demonstrates overall performance that significantly exceeds the role's expectations (Exceeds/Exceeds)
- HIGH PERFORMANCE (HP): Consistently demonstrates overall performance that exceeds the role's expectations on one dimension & meets on other (Exceeds/Meets)
- GOOD PERFORMANCE (GP): Consistently demonstrates overall performance that is competent in the role (Meets/Meets)
- MODERATE PERFORMANCE (MP): Consistently demonstrates performance results or values that is fully effective in the role but requires short term improvement to performance objectives or values. (Exceeds/Below)
- NEEDS IMPROVEMENT (NI): Overall performance does not meet the requirements of the role. Immediate improvement is required (BELOW/MEETS) or (BELOW/BELOW)



Employee Overall Comments	Management Overall Comments
Signature _____	Signature _____
Date _____	Date _____

5. BUILD YOUR 12-MONTH GROWTH PLAN

Let's look forward and determine how your development and efforts will contribute to the overall success of the business by growing your capabilities and responsibilities.

Think through this with both a TEAM GOAL and then an INDIVIDUAL GOAL

	EMPLOYEE GROWTH PLAN	EMPLOYER SUPPORT
FINANCIAL		
CLIENT		
OPERATIONAL		
GROWTH		
THNK BIG – GO WILD		