

## 30/60/90 Day Review

Review Period From:

To:

Employee:

Job Title:

Supervisor:

As an employee of Acra Lending (the "Company"), you are an important member of a team effort. The purpose of the 30/60/90-day review is to ensure that all available training, coaching and employee engagement tools are made available for every new hire. Our goal is to have the best informed, best trained and the most engaged employees possible.

### What is 30/60/90 Day Review

Onboarding goes well beyond the first day. Most onboarding programs can go on anywhere from one week and up to 90 days or even longer. It is important to acknowledge that learning on the job can continue throughout one's career. The basics are set up during the first 90 days, however the employee will continue to develop their skillset throughout their time at the company. A 30/60/90 Day Review provides the new employee a path to success.

The result: better performance, improved engagement and stronger retention. Employees who are engaged in these types of activities from the first day will feel a stronger connection to the company over time. They will feel acknowledged, included and more excited about their prospects for long term success, so they will likely demonstrate greater loyalty and productivity.

#### 30 Days

#### **Manager:**

**Provide honest and thoughtful review of a new hire. Your feedback will help us and you to put your employee on the right path for success within the company. Comment on any and all areas of weakness or skills that need improvement and additional training that you may have to provide. Once you identify the weaknesses and skills that need additional training use the Action Plan at the end of the review to describe the plan that you think will help the employee to improve and succeed in each area that needs improvement.**

**Note: Do not sign yet. Send completed form to HR for review.**

**HR will request signatures via Adobe Sign.**

Supervisor Signature

Date of Meeting

Employee Signature

HR Signature

Rating Name:	Description:
Needs Improvement	On the road to meet expectations with more training
Unsatisfactory	Not meeting expectations
Satisfactory	Meeting Expectations

Skills Assessment	Skill Rating: Unsatisfactory(U), Satisfactory(S), Needs Improvement(NI)		
<b>People Service:</b> Team member can Actively Listen and understand the needs of the person. As well as ability to provide a solution or expertise needed to satisfy the internal or external client's needs.	<b>Rating30:</b>	<b>Rating60:</b>	<b>Rating90:</b> Comments: Has the team member improved since the last review or there still concerns?
<b>Organizational Skills:</b> Team member can prioritize duties/tasks on the daily/weekly basis to get projects/work done in a timely manner.	<b>Rating30:</b>	<b>Rating60:</b>	<b>Rating90:</b> Comments: Is there improvement? Does team member still need support with this skill?
<b>Time Management:</b> Complete work in a timely manner. Ability to organize/prioritize and tasks/projects to deliver results on time.	<b>Rating30:</b>	<b>Rating60:</b>	<b>Rating90:</b> Comments: Has team member been able to keep up and improve?
<b>Team Work:</b> One of the most important components is the team members ability to work as part of the team and have productive interactions.	<b>Rating30:</b>	<b>Rating60:</b>	<b>Rating90:</b> Comments: How is the team working together, are there any concerns to address?
<b>what the Culture is:</b> Does the team member understand what our culture is and demonstrate it.	<b>Rating30:</b>	<b>Rating60:</b>	<b>Rating90:</b> Comments:

**Programs used by the Team**

**Member:** Only rate those that are Applicable to the position and the employee

**BytePro:** Select One

**Empower:** Select One

**DocVelocity:** Select One

**Paylocity:** Select One

**Salesforce:** Select One.

Comments: Do see any additional training needed for this area? Is the employee proficient in all applicable systems?

Are there still any challenges the team member has with the system? What are the challenges?

Solution to Challenges:

**Answer the following questions to determine if this employee will be successful in their role and their employment should continue with the company: Include as many details as possible and use Action Plan to help you determine the next steps:**

Has the employee met all the expectations of the job and is a valuable team member?

Has the team member gained all the necessary skills (Customer Service/Organizational and job-related skills) to be successful in their position?

Do you think that they still need any additional training? Any in the future? Explain:

Has the department transitioned well with the team member? Do they work well together? Describe:

Do you think that the workload for the employee is reasonable/too much/or too little? Explain:

Do you think this employee is successful in their role? If not, please explain:

*If the employee is not successful even with more training discuss with HR on next steps to release the employee at this stage.*

**(If the employee meets expectations and there are no action items to share, skip this next step)**

**Summary Action Plan on Areas of Concern/Opportunity & Any Additional Training Still Needed for Employee to Succeed:**

List of Areas of Concern/Weaknesses:	
How will you address the concerns?	
Will there be a need for additional tools to help the employee?	
What Additional Training is needed if any to improve performance?	
How will the training be provided?	
Who will provide the training?	
What is the Timeline?	