

## OpenERP Yearly Appraisal Form (PS)

### Appraisal Period:

From ...../...../..... to ...../...../.....

### Appraisee:

Name and Title:.....

### Appraiser:

Name and Title:.....

Date of Review:...../...../.....

### **PURPOSE OF THIS DOCUMENT:**

- To evaluate the results of the last action plan
- To initiate a clear and open communication about performance/skills and respect of OpenERP values
- To have a better knowing of the employee's professional objectives
- To decide together of the next action plan

### **PROCESS:**

The employee will be responsible for completing a draft of the Appraisal Form as a tool for self-evaluation and a starting point for the supervisor's evaluation. The employee can add examples of achievements for each criterion. Each item is defined in the glossary (page 7). Once the form had been filled, the employee sends it to his/her supervisor (3 days before the date of the appraisal) and to HR.

It is the primary responsibility of HR to gather the necessary input from the appropriate sources of feedback (internal and/or external customers, peers).

The employee and supervisor must each sign the review to signify its completion and their agreement about the final rate. The supervisor sends the form to the HR department.

## I. EVALUATION OF THE ACTION PLAN

If objectives were fixed at the beginning of the period, please fill the grid below to evaluate the results.

	<b>Employee auto-evaluation: Succeed or not ? How did you succeed your Action Plan ?</b>	<b>Manager evaluation and comments</b>
Objective 1: .....		
Objective 2: .....		
Objective 3: .....		

## II. SKILLS & ATTITUDES

	<b>Employee auto-evaluation (low, average or high) and notes</b>	<b>Manager evaluation (low, average or high) and notes</b>	<b>Manager's propositions / recommendations / Objectives for next period</b>
Business skills			
OpenERP software knowledge			
Pre-sales			
Training			
[For tech] Analytical level			
[For tech] Coding level			
[For tech] Testing level			
Projects leading skills			

	<i>Employee auto-evaluation (low, average or high) and notes</i>	<i>Manager evaluation (low, average or high) and notes</i>	<i>Manager's propositions / recommendations / Objectives for next period</i>
Team leading skills			
English			
Other language: .....			
Autonomy			
Communication			
Assertiveness			
Team spirit			
Conflict management			
Being client minded			
OpenERP commitment			
Customer commitment			
Stress management			
Meeting deadlines			
<i>[For managers/team leaders] Act as role model</i>			
People management			

	<i>Employee auto-evaluation (low, average or high) and notes</i>	<i>Manager evaluation (low, average or high) and notes</i>	<i>Manager's propositions / recommendations / Objectives for next period</i>
Team development			
Motivator			
Set expectations			
Coaching			
Relationship issues			
Planning management			
Issues management			

Regarding the skills with an "average" or "high" auto-evaluation, what are your propositions to reinforce them? To use them even more or better?

.....  
.....  
.....

Regarding the skills with a "low" appreciation, what are your propositions for improvement(s)?

.....  
.....  
.....

## III. OPEN ERP VALUES

	<i>Employee auto-evaluation (low, average or high) and notes</i>	<i>Manager evaluation (low, average or high) and notes</i>	<i>Manager's propositions / recommendations / Objectives for next period</i>
I am open			
I am positive			
I do things differently, I am creative			

	<i>Employee auto-evaluation (low, average or high) and notes</i>	<i>Manager evaluation (low, average or high) and notes</i>	<i>Manager's propositions / recommendations / Objectives for next period</i>
I am fast			
I am flexible			
I trust my colleagues			
I want to move forward			
I prefer to make things evolve than to not make mistakes			

[Manager] OVERAL PERFORMANCE RATING: 1 2 3 4 5

## IV. PROFESSIONAL DEVELOPMENT

What are **your** professional development objectives?

1. For the next 12 months?

.....  
.....  
.....

2. For the next 3 years?

.....  
.....  
.....

## V. EMPLOYEE COMMENTS

Use the following space to make any comments regarding the above performance appraisal.

.....  
.....  
.....

## VI. OBJECTIVES FOR THE NEXT PERIOD

What are the 3 SMART objectives for the next period?

The appraisee can propose ideas. They will then be validated together with the manager/appraiser.

**S**pecific: Objectives should specify what has to be achieved

**M** measurable: You should be able to measure whether you are achieving objectives or not

**A**chievable: Are the objectives you set, achievable and attainable?

**R**ealistic: Can you realistically achieve the objectives with the resources you have?

**T**ime-bound: When do you want to achieve the set objectives?

Ex: To recruit 15 junior developers (see job desc) for the 30<sup>th</sup> December 2013

It's specific (the action is to recruit), measurable (15 developers), achievable (I am capable to do it), realistic (I have the resources) and time-bound (30<sup>th</sup> December 2013)

Objective	How to achieve it ?	KPI
1. To...		
2. To...		
3. To...		

Additional comments:

.....  
.....  
.....

.....  
Appraisee signature

...../...../.....  
Date

.....  
Appraiser signature

...../...../.....  
Date

**Date for the next review:** ...../...../.....