



Your guide to

Appraisals



PENINSULA

Contents

Contents	1
Introduction.....	2
Benefits of Appraisals	4
Why do Appraisals?.....	5
Objectives.....	6
The Procedure.....	7
Preparation for Appraisal (completed by the employee).....	8
How employees complete the Preparation Form.....	9
The Appraisal Interview	12
Assessing the Performance Rating	13
The Action Plan Letter	15
After the Interview	16
Conclusion	17
Specimen Job Description	18
Preparation for Appraisal	19
Job Task Performance Table	21
Performance Appraisal.....	22
Action Plan	25
Action Plan Monitoring.....	26
Action Plan	27

Introduction

The successful operation of any company depends primarily on using the full potential of its workforce.

This necessitates certain criteria being met which are to the benefit of both the company and its employees and requires a strategy to be put in operation to achieve this aim.

Both Supervisors and staff have to be aware of the requirements of the individual job. This is best served by having a Job Description for each job.

Supervisors have to be able to identify the development needs of the company and their employees. To meet this aim there is a requirement for Supervisors to carry out a formal appraisal scheme.

The aim of appraisals should **ALWAYS** be positive, even when certain aspects of a job being carried out by an employee are not up to the required standards. No useful purpose is achieved by “nit picking”, ruthlessly criticising an employee or entering something in the ‘debit’ section on the appraisal form for the sake of it. Above all employees should not be made to view the appraisal as “that annual ordeal”!

Appraisals should be made up of four elements, namely:

Preparation for appraisals	By employee
Appraisal form completion	By appraiser
Appraisal interview	Appraiser and employee
Actions plans	Agree between appraiser and employee

The interests of the company and its clients/customers are best served by a workforce, which as individuals and a team, are carrying out their tasks to the most effective performance level.

This is what performance appraisals are seeking to achieve and why they can have an impact on employees and company performance.

At the end of all appraisals the employee should not be left feeling deflated. The aim is motivation with the knowledge that through targeting objectives, supervisors and the employee are working together to achieve the aims of that employee to be equipped better for his/her present or future roles within the company.

Supervisors and the employee should be working together to achieve the aims of that employee being better equipped for his/her present or future roles within the company.

This booklet has been produced to assist Appraisers in the completion of appraisals for their employees.

It identifies all aspects of the company's appraisal scheme, particularly the areas relevant to you as an Appraiser, but also to identify the input required by your employees. This is particularly relevant in relation to preparation for appraisal and target/objective setting.

Although it is not always recognised, the most important asset that a company has is its employees. A company should strive to help its employees perform at their most effective.

The purpose of an appraisal scheme is a recognition by the company of the need to maximise the use of its human resources, to aid the development of its employees and the business.

For performance appraisal to be effective it requires us all to play our part:

- 1. Supervisors are required to give full commitment to the scheme by allowing time for preparation, discussion and monitoring but, above all, to be clear about its objectives.**
 - 2. You equally need to be fully committed to the scheme by allowing time for honest and frank completion a Preparation for Appraisal Form.**
-

You need to stress the importance of (ii) above to them and of how important it is to them to complete their Preparation for Appraisal Form fully, that it is for their ultimate benefit to assist you in being able to develop them better and build on their strengths as well as improving any weaknesses.

The overall objective of the scheme is one of being **POSITIVE, NOT NEGATIVE**, namely:

TO IMPROVE THE EMPLOYEE'S CURRENT JOB PERFORMANCE AND FUTURE DEVELOPMENT AND THEREBY THE PERFORMANCE OF THE COMPANY SO THAT BOTH BENEFIT.

Above all you have to make sure that you do not turn their appraisal and interview into "that annual ordeal".

Benefits of Appraisals

Appraisals record an assessment of an employee's performance, potential and development needs. They are an opportunity for discussion to take place regularly, in a formal manner, on the overall view of work, content, loads and volume and to review what has been achieved during the last appraisal period and to agree objectives for the next.

Appraisal are not implemented solely for the benefit of the individual, but are a means of improving the performance of the whole company. By improving all round job performance, job satisfaction, improved communication and understanding, increased awareness and participation, better planning and co-ordination, the business will be in a position to provide **an improved service for our clients**.

It will also assist in developing employees for future roles within the company, especially in times of growth.

Why do Appraisals?

The system of appraisal will provide the means for you and your employee to jointly review his/her performance and in doing so it will:

1. Help improve your employee's future job performance by identifying strengths and weaknesses and determining how strengths can best be utilised and how weaknesses can be overcome.
2. Help reveal problems which may be restricting your employee's progress and causing inefficient work practices.
3. Encourage regular dialogue between yourself and your employees about their work performance which will result in improved communications and clearer direction.
4. Develop a greater degree of consistency by ensuring that you and your employees meet formally and regularly to discuss performance and potential.
5. Assist succession planning and determine suitability of employees for promotion.
6. Move away from us reacting to an event into preparing for the event.

The purpose of this scheme is to:

1. Ensure an understanding and awareness of the individual/business objectives and the barriers preventing their achievement.
2. Develop a knowledge and agreement of what is expected of individuals and how their contribution fits into the organisation.
3. Review the individual's performance, giving a formal opportunity to discuss progress and identify improvements and build on strengths.
4. Review potential development needs and to predict the employee's future capabilities and how these can be developed.
5. Review progression and to assess the employee's eligibility to achieve promotion.
6. Develop individuals so that job satisfaction and job performance is maximised, thus increasing effectiveness and efficiency resulting in the provision of an improved service for our clients/customers.
7. Ensure we use our workforce in the most effective way.

Objectives

The most potent factor in achieving our overall objective is the development and maintenance of an open relationship between you and your immediate Supervisor (Appraiser). There is, nevertheless, a need to summarise this in a formal way, by ensuring that you discuss with your job performance, in terms of:

What are the most important parts of their job?

- Which parts of the job they have done well and why?
 - What can be done to build on their strengths?
 - What they have not done so well and why?
 - What action can be taken to overcome these shortcomings?
 - Achievement or non-achievement of their current targets.
 - Agreement on their future targets.
 - Define an action plan for the future setting further targets.
-

The discussion between you and your employee is the central and most important feature of the appraisal scheme. To ensure that the discussions are as constructive as possible, and follow the same broad lines throughout the company, they are supported by the following documents:

- Job Description
- Preparation for Appraisal Form (Form PREP1) to be completed by the employee
- Job Task Performance Table (Form TPT)
- Performance Appraisal Form (Form PAF)
- Action Plan Form (Form ACT01)
- Action Plan Monitoring Form (Form ACT02)
- Action Plan Letter (Form ACT03)

The Procedure

The appraiser will start the process by:

- 1. Ensuring that the employee has a copy of all relevant documentation and suggest that they read it thoroughly.**
- 2. Give the employee a Preparation for Appraisal Form, asking them to complete it and return it within two weeks.**
- 3. Give any further guidance or clarification on any aspect of the appraisal scheme which they may want.**
- 4. Arrange a mutually convenient date, time and place for the appraisal interview (about four weeks after the Preparation for Appraisal Form is returned to your Appraiser).**

The employee needs to complete the Preparation for Appraisal Form, and return this as agreed to you. You will need to make rough details on the Action Plan Form (as this will form the basis of your Agreed Action Plan) and bring this to the interview, together with the Preparation for Appraisal Form, which will have been returned to you a few weeks before the interview.

The appraisal interview is conducted and the Performance Appraisal Form completed. Amendments to the job description can also be discussed and made at this time.

After the appraisal interview two copies of the Action Plan Letter should be completed by you. One copy is given to the employee and the other is retained on the employees file with the completed appraisal form, preparation for appraisal form and any other relevant documentation.

On the dates specified on the Action Plan Letter you should meet with your employee, and together review the agreed actions.

Preparation for Appraisal (completed by the employee)

Before completing the Preparation for Appraisal Form, the employee should read the "explanatory notes" on the front page of the form.

The following points are particularly significant:

- 1. A space is provided on the Performance Appraisal for them to write any comments about the appraisal, that they wishes to make, after the interview.**
- 2. If they disagree with the outcome of the appraisal then they should bring this to your attention and the relevant action should be undertaken by you (this may mean checking information again, gathering evidence or even referring to your Manager).**
- 3. The Preparation for Appraisal Form is a confidential document, and the employee should feel quite secure in answering the questions fully and with complete frankness.**

The benefits of completing the Preparation for Appraisal Form fully and frankly are considerable.

It forms the basis for the appraisal interview as to what the job is really about, how they perform it, and what needs to be done by them, you or the company. It helps you and the employee to get to know each other better, and to help each other with common problems. This is only true if the Preparation for Appraisal Form is fully and frankly completed. It is their opportunity to express how they think they have performed. You and the employee may not agree on the answers to the questions on the Preparation for Appraisal Form. But both parties, at least, are thinking about the same questions, especially as the Performance Appraisal Form is in the same format and the same details will be discussed during the appraisal interview.

They may influence your judgement of their performance. The comments on your Preparation for Appraisal Form may give you new information or lead to a fresh consideration of their performance (either generally or in some particular matter).

Remember the Appraisal is for their benefit now and in the future, so it is in their interests to be frank and honest about their performance. If that means indicating weakness in their performance so be it.

How employees complete the Preparation Form

They may feel that their job as described in the job description is not accurate or up to date, their appraisal interview provides an ideal opportunity to talk about and update the Job Description.

Question 1

They are asked to think about and write down what they consider they have done well over the past year. Initially, they should think about the most important areas of their job, but they may consider that a particular task, not directly within these areas, was accomplished well. This should be noted down.

To further identify things which have been done well, they should think back to when they achieved personal satisfaction or received some kind of praise or recognition, or met a particularly difficult deadline when under pressure, etc.

The second part of this question may require deeper thought. They need to think about why they performed well in the areas previously identified. They should consider how they tackled them, what skills were needed, what difficulties they had to overcome, and how eventually they accomplished the results. They should not be loath to "blow their own trumpet". It is important that they and you as the Appraiser are aware of your strengths.

Question 2

To answer this question about what areas of their job could have been done better over the past year, they should think initially about the most important areas of their job. They should also consider particular tasks or occasions not involved with these important areas, and note them down if they feel they could have been better achieved.

The second part of this question asks what prevented them from performing better in those areas which they have identified. Some possible reasons maybe another person's or department's influence, their lack of knowledge, time constraints, relationship with others, Company rules, etc. These are possible suggestions to help them identify the things preventing a better performance. They need to think about themselves and all the things which affect them and their job, including people (you, peers and subordinates), their training to date, department and company matters, etc.

Question 3

This final question looks to the future. It asks them to suggest how their performance can be improved. These future actions may relate to themselves, you or Department Manager, the company, or anyone else. Again they should try to think beyond themselves only, and consider every aspect of their job and the environment which could have had an influence on their performance.

It is particularly important when considering the answers to Questions 2 and 3 that they put down exactly what they think, however unrealistic, unimportant or unmentionable they feel their thoughts to be. They should remember that you need their knowledge and experience of their job difficulties, and needs their help in trying to overcome them.

When they complete their Preparation for Appraisal form they should remember that the appraisal is a joint process between them and you. The Preparation for Appraisal Form is part of that process. It can contribute significantly if it is completed fully and in an open committed manner.

The particular questions on the Form confine themselves to looking at strengths and weaknesses, and future action on them, but space is also provided on the Preparation for Appraisal Form for them to make a note of any other topics they may wish to raise during the appraisal interview.

Completion of Performance Appraisal Form (Appraiser)

The appraisal interview revolves around the completion of the Performance Appraisal Form. You may ask the employee to sign the form to signify that they "have seen and discussed this appraisal" at the conclusion of the interview, or the Performance Appraisal Form may be completed in pencil and notes made during the interview, with the form being formally completed afterwards. You will then briefly meet again for you to sign the form.

Sections 1 and 2 of the Performance Appraisal Form correspond to the questions on the Preparation for Appraisal Form. Completion of these sections follows from the discussion between you and the employee, and provides the basis for the agreed future action plan.

The third section of the form is the overall grading of their performance. Having carefully considered their job performance, you will decide which of the ratings most accurately reflects and summarises their work over that year.

It is important to understand exactly what the ratings mean, their definitions, and how they relate to an individual's performance, the department and the company. The overall performance is evaluated on a five point scale related to degrees of effectiveness (the sixth box applies to new employees or those who have been in the current job for less than three months).

Normally, about 60% of the Company's employees would be rated in the middle box - "Effective" (C). The meaning of this rating is important. It does not mean "average", "satisfactory" or a performance which is less than worthwhile. It means that the Employee is **"EFFECTIVE AND MAKING A POSITIVE AND VALUABLE CONTRIBUTION"**. To attain this standard of performance means that he/she is performing his/her total job in a competent and altogether effective manner, and is a valuable asset to the department and company.

You and the employee may feel that training could provide some specific assistance to improve or build on your performance. This should be indicated in Section 4 of the Performance Appraisal Form.

Section 5 of the Performance Appraisal Form is provided for you to make any comments the employee may have about the appraisal, if they so wish. You may record anything they feel regarding the discussion, the rating or any aspect of the appraisal process.

They are required to sign the Performance Appraisal Form to confirm that they "have seen and discussed this appraisal". If they wish to discuss the appraisal further, then they are required to let you know.

Question 1

You are asked to think about and write down what you consider the employee has done well over the past year. Initially, you should think about the most important areas of the job, but you may consider that a particular task, not directly within these areas, was accomplished well. This should be noted down.

To further identify things that the employee has been done well, you should think back to when he/she received some kind of praise or recognition, or met a particularly difficult deadline when under pressure, etc.

Question 2

The next question may require deeper thought. You need to think about why he/she performed well in the areas previously identified. You should consider how the employee tackled them, what skills were needed, what difficulties he/she had to overcome, and how eventually the results were accomplished. It is important that you are aware of your employee's strengths, and make them known to him/her.

Question 3

The previous questions are concerned mainly with past performance, but with this question you should record your ideas for the future. You need to identify the employee's strengths (what he/she did well over the past year and why), and how they can be utilised.

Question 4

To answer this question about which areas of the employee's job could have been done better over the past year, you should think initially about the most important areas of the job. You should also consider particular tasks or occasions not involved with these important areas, and note them down if you feel they could have been better achieved.

Question 5

This question asks what prevented the employee from performing better in those areas which you have identified in Question 2a. This may be because of another person's or department's influence, his/her lack of knowledge, time constraints, relationship with you, others or company rules, etc. These are possible suggestions to help you identify the things preventing a better performance. You need to think about all the things which affect the employee and his/her job, including people (your Manager, you and subordinates), training he/she has received to date, department and company matters, etc.

Question 6

This question looks to the future. It asks you to suggest how the things mentioned in Question 2b can be overcome. These future actions may relate to yourself, your employee, the company, or anyone else. Again you should try to consider every aspect of the job, environment and influence on performance.

The appraisal is a joint process between you and the employee. The Preparation for Appraisal Form is part of that process. It can contribute significantly if it is completed fully and in an open committed manner.

The Appraisal Interview

The appraisal interview should be a **FRANK** and **OPEN DISCUSSION**. It should not be a stressful, highly pressurised situation where the parties involved are unaware of the objectives of the interview. You and your employee should bear in mind that the interview should be a discussion with several purposes. These are:

- To agree what the job is really about.
- To discuss the employee's job performance
- Their strengths, and ways of building on them both for their benefit and the company's.
- Any shortcomings, and ways of overcoming them, as they affect them and the department.
- To discuss the overall grading of their performance. Remind them to bring with them their Preparation for Appraisal Form.

To achieve this during the interview you should:

- Put the employee at ease and state the purpose of the interview (two way communication).
- Discuss the job situation and aspirations.
- Have accurate knowledge of the required and actual job performance.
- Give praise for effective work. If possible, relate to specifics.
- Limit criticism to two or three points of minor importance - specifics. (Unless there are severe shortfalls.)
- Invite self-criticism, encourage comment and questions.
- Discuss any obstacles to improvement - think positively.
- Summarise all major points discussed (at each stage).
- Ensure Action Plan is agreed and understood (consult).
- Agree targets and review – dates.
- Listen and be seen to be listening.
- Ask open-ended questions, beginning with "how", "why", "when".
- Not make promises you may not be able to keep.
- Appraise job performance, not the person. (Don't be biased - either way).
- Spend as much time as possible looking to the future.

Put the Employee at ease and remember:

DO NOT make it the “Annual Ordeal”. **DO NOT** be negative and overcritical.

BE fair and unbiased.

BE positive and constructive in criticism (if any). **BE** praiseworthy (when deserving).

You should always commence the interview with THE POSITIVES then deal with **THE NEGATIVES**, otherwise the employee will lose interest and not respond to the positives or targets.

Assessing the Performance Rating

The third section of the form is the overall grading of the employee's performance. Having carefully considered his/her own and your view of the job performance, you need to decide which of the ratings most accurately reflects and summarises the employee's work over the year.

It is important to understand exactly what the ratings mean, their definitions, and how they relate an individual's performance to the department and the company.

Normally, about 60% of the company's employees would be rated in the middle box - "Effective" (C). The meaning of this rating is important. It does not mean "average", "satisfactory" or a performance which is less than worthwhile. It means that the employee is **"EFFECTIVE AND MAKING A POSITIVE AND VALUABLE CONTRIBUTION"**. To attain this standard of performance means that he/she is performing his/her total job in a competent and altogether effective manner, and is a valuable asset to the department and company.

You and the employee may feel that training could provide some specific assistance to improve or build on his/her performance. This should be indicated in Section 4 of the Performance Appraisal Form and the employee be allowed to copy on his/her Preparation for Appraisal Form.

Section 5 of the Performance Appraisal Form is provided for your employee to make any comments about his/her appraisal, if he/she so wishes. The employee may record anything he/she feels regarding the discussion, the rating or any aspect of the appraisal process.

You are required to sign the Performance Appraisal Form to confirm that you "have discussed this appraisal with your employee". The employee can raise any issue if he/she is unhappy about his/her appraisal or rating, this should be dealt with appropriately. You are trying to evaluate exactly how the employee has performed in each of these areas, together with his/her overall performance of the job as a whole. Your assessment of his/her performance (on the Job Task Performance Table) should have been transcribed onto the Performance Appraisal Form.

When evaluating the rating for the main tasks on the Job Description you will need to use a Job Task Performance Table. This table has a list of tasks and you will need to indicate for each task to which column the employee's performance applies.

It is important to note that the reference made on the specimen job description to "The above is not an exhaustive list" has to be rated as a 'general' task in itself, it obviously covers all/any additional tasks to the job description. Care is needed in rating this item.

If significant additional tasks **have** been requested or performed then the Appraiser has to take into consideration.

- The employee's willingness to undertake such tasks.
- The experience, qualifications, ability required to do them vis-à-vis those of the person asked to perform them. (E.g. it is unlikely on a train that the Buffet Attendant could successfully drive if asked!)

The five rating columns are as follows:

- A) OUTSTANDING PERFORMANCE** - the employee has consistently had an outstanding performance in all aspects of this task.
- B) MORE THAN EFFECTIVE PERFORMANCE** - the employee has consistently performed more than effectively in most aspects of this task.
- C) EFFECTIVE PERFORMANCE** - the employee has consistently in most aspects of the task performed at an effective rate.

- D) **SOMEWHAT EFFECTIVE PERFORMANCE** - the employee's performance has regularly been less than effective in some aspects of the task and some improvement is required.
- E) **LESS THAN EFFECTIVE PERFORMANCE** - the employee is consistently performing less than effectively (underachieving) in most aspects of the task and a great improvement is required.

All employees rated E would need to be re-appraised after three months and then six months (using the full Appraisal procedure in both instances), as it is unlikely that in three months an employee would move from E to C.

Similarly all employees rated D and X need to be re-appraised after six months. The rating X applies to any employee whose service in the company or in the current job is less than three months at the time the appraisal timetable commences.

The Action Plan Letter

This should be completed by yourself, either fully or in draft form, during the appraisal interview. In either case you must give a completed copy to the employee during or after the interview.

Normally its contents will be a summary and written confirmation of the future actions agreed upon, by you and the employee, during the discussion on his/her “strengths” and “shortcomings”. The letter also contains dates throughout the year when you and the employee should jointly review progress on the contents of this action plan letter. This means that the formal discussion of his/her performance is not just an annual event, and becomes more of a continuous and developing process between you and him/her.

After the Interview

Action Plan Letter

The completed version should be handed to the employee with a copy on file.

Agreed Action Plan

If the employee is not already working to an Agreed Action Plan, you will need to give him/her a blank copy of the Agreed Action Plan, with the Action Plan Letter.

You should then explain the philosophy and mechanics of the form to the employee, and possibly discuss in general terms his/her targets/objectives. A further meeting should then be arranged to discuss, amend, if necessary, and jointly formulate the Agreed Action Plan.

Reviewing and updating these targets provides other occasions for you to meet and discuss his/her performance with you during the year.

Conclusion

The **MAIN** aim is to try to increase effectiveness and develop potential and to **MOTIVATE** the employee **NOT DEFLATE** him/her. The aim is not to make appraisal the reason for disciplinary procedures. If the employee is underachieving then management should have already been considering or taking disciplinary action prior to appraisal.

If appraisal can result in automatic disciplinary action then the system will lose all credibility and value.

Do not be overcritical or 'nit-pick'. Above all try not to make it that “**ANNUAL ORDEAL**”.

Remember **ALWAYS** praise before you criticise.

Specimen Job Description

JOB DESCRIPTION: TRANSPORT MANAGER

Job Title:

Transport Manager.

Main Purpose of Job:

To control all transport operations and prepare and monitor the transport budget.

Responsible to:

The Operations Director.

Responsible for:

A team of drivers, mechanics, office staff.

Main Tasks of Job:

- 1) Organise and control staff under his/her control.
- 2) Ensure accurate completion of time sheets, tachographs and other driver records.
- 3) Maintain standards of maintenance and cleanliness of vehicles.
- 4) Maintain required standards from staff whilst on client's premises.
- 5) Ensure the economical and efficient use of transport.
- 6) Ensure servicing, maintenance and condition of vehicles.
- 7) Maintain health and safety standards of staff under control.
- 8) Liaising with drivers, managers, clients and security to ensure the above tasks are completed effectively.

The above is not an exhaustive list of duties and you will be expected to perform different tasks as necessitated by your changing role within the organisation and the overall business objectives of the organisation.

Job description approved by:

Date:

Employee Signed:

Date:

Employer Signed:

Date:

Form PREP1

Preparation for Appraisal

Name:
<input type="text"/>
Position:
<input type="text"/>

Date of Appraisal:
<input type="text"/>
Department:
<input type="text"/>

The comments you make on this form are to assist in your appraisal.

On the Appraisal Form itself a space is provided for you to make any comment you may wish regarding your appraisal.

If you disagree with the outcome or are unhappy with your appraisal, discuss with your Manager for the appropriate action to be taken.

Please consider your performance during the period under review and complete the following:-

Which parts of the job have you performed best? How did you achieve this?
<input type="text"/>

Which parts of the job have you performed less well? Were there any circumstances which prevented a better performance?
<input type="text"/>

What could or should be done by you, your Appraiser, the Company, or anyone else to help improve your performance in any way:

Notes to bring to the Appraisal interview:

Form PAF

Performance Appraisal

Confidential – To be completed by appraiser

Name:
Position:
Period Covered By This Appraisal:

Date of Appraisal:
Department:

REVIEW OF PERFORMANCE

Consider the job holder's results in his/her work in general over the last year, relating, in particular, to agreed targets/objectives/standards of performance, and to existing job description.

Which parts of the job have you performed most effectively?

How has this been achieved?

What action will be taken to build on the above strengths?

What parts of the job could have been done better?

Why was this?

What action will be taken to overcome the above difficulties?

Overall Grading of Performance

From your evaluation against the main tasks of the job description and the markings on the Job Task Performance Table, indicate the overall performance achieved by the job holder. Bear in mind particularly the definitions of the ratings. The assessment should reflect the performance actually achieved in the circumstances which prevailed. Any unusual/special factors governing the year's performance should be stated below the assessment.

- | | |
|--------------------------|--|
| <input type="checkbox"/> | A - Constantly gives an outstanding performance in most areas of their job. |
| <input type="checkbox"/> | B - Constantly gives more than an effective performance in most areas of their job. |
| <input type="checkbox"/> | C - Gives an effective performance |
| <input type="checkbox"/> | D - Sometimes gives an effective performance but some improvement required in many areas of their job (review in six months). |
| <input type="checkbox"/> | E - Constantly underachieving and less than effective in most areas of their job (review in three and six months). |
| <input type="checkbox"/> | X - Too early to assess (review in six months). |

ALL APPRAISER SHOULD NOW COMPLETE THE AGREED ACTION PLAN LETTER

The following training and other action will be taken:

Employees Comments

The space below is provided for the employee to make any comment he/she may wish with regard to the appraisal:

Employee Signature:

Date:

Action Plan

Following Appraisal Interview

Dear **#INSERT NAME#**,

During the discussion reviewing your performance on **#INSERT DATE#** we each agreed to commit ourselves to an action plan aimed at maximising the effectiveness of your role within the company.

I agreed to:

You agreed that you would:

This will be reviewed periodically to ensure:

We also briefly discussed what your job objectives should be for the coming year, and as indicated, I now require you to complete the enclosed Action Plan Form (Form ACT01) in light of the things we said and to meet with me to discuss them, on **#INSERT DATE#**.

Signed:

Appraiser



PENINSULA

Peninsula, Victoria Place Manchester M4 4FB
T: 0844 892 2773 W: peninsula-uk.com