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<COMPANY NAME> PERFORMANCE REVIEW FORM

Part 2 – Performance Factors

The following factors are supportive of the performance goals listed in Part 1. Please circle the level of performance demonstrated on each of the following factors.

- 1 = Performance is unacceptable; must become competent in 30 days.
- 2 = Performance is substandard and needs improvement; possibly additional training.
- 3 = Performance meets the expectations required of the position.
- 4 = Performance is occasionally above expectations.
- 5 = Performance is consistently above expectations.

A. Personal Rating Criteria

1. Interpersonal Skills/Customer Service

- Managing Conflict: Brings conflict or dissent into the open and uses it productively to enhance the quality of decisions; arrives at constructive solutions while maintaining positive working relationships. 1 2 3 4 5
- Negotiation: Approaches situations with a “win-win” concept; deals with situations in which both parties communicate openly and reach agreement. 1 2 3 4 5
- Customer Service: Anticipates customer needs; takes action on needs; continually searches for ways to increase customer satisfaction; uses empathy when dealing with internal and external customers; uses 10/10 STAR. 1 2 3 4 5

2. Personal Qualities

- Approach to Job: Positive, constructive and enthusiastic approach to job, encourages cooperation by example – works well in team efforts. 1 2 3 4 5
- Initiative: Self-starter, requiring minimum supervision, identifies tasks and pushes for results. 1 2 3 4 5
- Cost Conscious: Minimizes expenses without sacrificing quality; makes decisions as if they were spending their own money. 1 2 3 4 5
- Professional Maturity: Open to suggestions/criticism, uses strengths, strives for improvement and corrects mistakes 1 2 3 4 5

3. Communication Skills

- Verbal Communication: Communicates effectively and in a timely manner. Lets people know of decisions, changes, and other relevant information on a timely basis. Practices open communication. Listens well and actively responds. 1 2 3 4 5
- Phone/Radio Etiquette: Answers the phone in a timely manner, puts a “smile” in their voice and treats the caller with respect. 1 2 3 4 5
- Written Communication: Writes clearly and effectively; uses appropriate style, grammar, and tone in informal and formal business communication OR completes work orders thoroughly and legibly. 1 2 3 4 5

B. Performance Rating Criteria

1. Quality of Work/Quantity of Work

- Thoroughness: Checks for thoroughness and accuracy of the tasks completed; makes every attempt to do things “right” the first time. 1 2 3 4 5
- Adjusts Levels of Effort: Adjusts the level of effort depending on the nature of the task; spends an appropriate amount of effort to achieve maximum results; works smarter not harder. 1 2 3 4 5
- Quantity of Work: Accomplishes the amount of work expected; meets goals and deadlines. Uses time effectively through planning and seeks advice when priorities need to be set. 1 2 3 4 5

2. Technical Competence

- Job Knowledge: Has the technical ability and judgment necessary to do the job. 1 2 3 4 5
- Versatility/Flexibility: Able and willing to work in areas related to outside primary area of expertise. 1 2 3 4 5
- Creativity: Has imaginative new ideas and methods and demonstrates the ability to implement them. 1 2 3 4 5

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C. Management Rating Criteria (For management and supervisory employees.)

1. Department Management

- Planning and Organizing: Determines what is to be accomplished and organizes to get it done on schedule. 1 2 3 4 5
- Providing Direction: Recognizes the underlying causes of problems – makes prompt, practical decisions, follows up to assure success. 1 2 3 4 5
- Delegating Responsibility: Delegates responsibility to and seeks recommendations of subordinates in keeping with their abilities; inspects work of others regularly to determine if expectations are met. 1 2 3 4 5

2. Human Resource Development

- Motivation: Inspires others and sets a good example. Seeks to identify what motivates each individual. 1 2 3 4 5
- Developing People: Is effective in selecting, guiding and appraising people, including identification and appropriate handling of marginal performance. Helps their employees set and achieve goals. 1 2 3 4 5
- Educator: Determines the most effective method to educate employees and assumes a proactive role in their development. Uses creative techniques to facilitate adult learning. 1 2 3 4 5

Part 2 Rating = _____ Total of Part 2 Performance Levels , Number of Factors Rated

Part 1 Rating = _____

Part 2 Rating = _____

+ _____ Divide by two for Overall Rating = _____

OVERALL RATING
Please indicate (X) the overall rating achieved.

1	2	3	4	5
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Comments:

Employee

Date

Manager

Date

Human Resources

30-Day Action Plan

Date of Follow Up: _____

Opportunity	Training/Action Needed	Person(s) Responsible	Results at Follow Up
Performance Plan	Performance Plan developed by Manager and Employee; goals assigned to each facet of job description.	Employee/ Manager	Completed and copied to Human Resources 30 days after the Annual Review.