



A framework for the reviews and appraisals of team members.

To help drive a high performance culture..

This worksheet gives you a framework for completing staff appraisals. Staff appraisals should not replace immediate real-time feedback (positive and developmental).

In B2B small businesses, it's critical to have a culture of real-time feedback to continuously develop, improve the delivery of the services, and address any issues in all roles across the business (including suppliers, contractors etc).

Reviews should strike a balance between an evaluation of the team members' recent performance; and their personal development goals for the period ahead. They should be a chance to discuss how the employee is feeling about their role and their future at the company.

There are two key objectives for performance reviews:

- 1) Company perspective: Keeping the performance bar high. Nurturing, stretching, developing, and retaining talent.
- 2) Employee perspective: Offering employees clarity about how their performance and potential are viewed, and guidance on how performance can be enhanced, together with open discussion about their professional and career development

A 45-minute, one-to-one session every 6-months is a typical format. Both the manager and the employee should prepare in advance, and ideally get feedback from other relevant colleagues (if applicable). The purpose of these conversations is to complement, not to replace, the real-time feedback mentioned at the start.

How to use this Worksheet: feel free to use this framework with your team members to review and appraise their performance. Copy and paste the Q's and send them to help them prepare for their review.

1. What are your key achievements over the last 6 months?

2. Which parts of your job do you think you do well?

3. Which parts of your job do you need to develop in?

4. How would you rate your performance out of 10? What's in the gap to get to a 10?

5. What training/support do you think you need?

6. Key objectives for the next (6) months (make sure they're SMART: Specific, Measurable, Achievable, Realistic, Timebound)

7. (Both parties sign and agree the review)

WHAT ARE YOUR KEY TAKEAWAYS / ACTIONS FROM THIS WORKSHEET?

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