

ANNUAL REVIEW: Performance Appraisal and Career Planning

EMPLOYEE NAME:	COMPANY:	DATE:
CURRENT JOB TITLE:	EMPLOYEE NUMBER:	DATE HIRED :
DATE POSTED TO PRESENT POSITION:	MANAGER'S NAME:	DATE OF PREVIOUS REVIEW: PREVIOUS REVIEW BY:

PART A: PERFORMANCE APPRAISAL

For the following questions:

Rate how the individual has performed job requirements by circling the number which best describes their performance, according to the following definitions:

- 4 EXCEEDS ALL REQUIREMENTS OF JOB
- 3 EXCEEDS MOST REQUIREMENTS OF JOB
- 2 MEETS REQUIREMENTS OF JOB
- 1 MEETS SOME BUT NOT ALL REQUIREMENTS OF JOB
- 0 DOES NOT MEET REQUIREMENTS OF JOB

1. JOB KNOWLEDGE

0	1	2	3	4
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To what extent does employee possess sales, customer, technical and company knowledge required to drive business solutions to completion?

Comments

2. INNOVATION/CREATIVITY/INITIATIVE

0	1	2	3	4
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How well does employee generate creative solutions or try different and novel ways to deal with problems and opportunities?

Comments

3. MOTIVATION/ACCEPTANCE OF NEW CHALLENGE

0	1	2	3	4
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How well does employee demonstrate the ability to capitalize on changes and the willingness to make extra effort, take responsibilities, continuously self-improve?

Comments

4. ORGANIZATIONAL SKILLS

0	1	2	3	4
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How organized and prepared is employee for all activities and meetings?

Comments

5. ABILITY TO PRIORITIZE GOALS AND OBJECTIVES

0	1	2	3	4
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How well does employee plan and allocate time for all assignments?

Comments

6. TEAMWORK

0

1

2

3

4

How well does employee demonstrate the ability to work with other colleagues? How actively does he/she participate in activities/projects?

Comments

7. INTERPERSONAL EFFECTIVENESS

0

1

2

3

4

How well does employee develop rapport with candidates at all levels, maintain cooperative relationships, and deal with others in a tactful manner?

Comments

8. SPEED OF EXECUTION/SENSE OF URGENCY

0

1

2

3

4

How reliable is employee in completing tasks and filling requirements in a brisk and urgent manner?

Comments

9. FOLLOW THROUGH AND COMPLETENESS

0

1

2

3

4

How well does employee follow through to complete required tasks and ensure punctual deliver of items?

Comments

10. LEADERSHIP (IF APPLICABLE)

0

1

2

3

4

How well does employee demonstrate the ability to envision customers' requirements, influence change, and anticipate change?

Comments

11. SOURCING

0

1

2

3

4

How well does employee demonstrate the capability to source candidates from various sources including networks, cold calling and referrals?

Comments

12. SCREENING

0

1

2

3

4

How well does employee display the ability to screen candidates effectively against requirements through phone and face-to-face interviews?

Comments

13. UNDERSTANDS REQUIREMENTS

0	1	2	3	4
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How well does employee display correct understanding of requirements and ask intelligent questions in order to accurately screen candidates?

Comments

14. COMMUNICATION SKILLS

0	1	2	3	4
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How well does employee communicate at the level of any candidate for any requirement?

Comments

15. CANDIDATE CONTROL

0	1	2	3	4
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How well does employee show ability to control candidates through the process including offer negotiation, placement, and onboarding?

Comments

16. QUALITY OF CANDIDATES

0	1	2	3	4
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How well does employee source, recruit, close and start high quality candidates, proven by feedback and review process of the client once placement is made?

Comments

17. RESUME WRITING SKILLS

0	1	2	3	4
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How well does employee show ability to deliver error-free, well-formatted resumes on a consistent basis?

Comments

18. REFERENCE CHECKING

0	1	2	3	4
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How well does employee perform all required reference checks on a consistent basis for all candidates?

Comments

19. CANDIDATE PREPARATION

0	1	2	3	4
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How thoroughly and completely does employee prepare candidate prior to any client interview?

Comments

OVERALL PERFORMANCE RATING

Add above scores together:

SUM OF RATING:

Divide sum by 19 to obtain average score:

AVERAGE:

OVERALL RATING:	UNDERPERFORMS			MEETS EXPECTATIONS				EXCEEDS EXPECTATIONS	
	0	0.5	1	1.5	2	2.5	3	3.5	4

PART B: SUMMARY OF OBJECTIVES & ACCOMPLISHMENTS

20. Summarize briefly, in order of importance, the major responsibilities, duties, and/or objectives of employee's job, including individual skills:

21. Summarize the specify major accomplishments during the review period and the individual skills which positively impacted job performance:

Major Accomplishments	Individual Skills

22. Summarize major objectives which were not accomplished during the review period and describe individual job skills requiring improvement:

Unachieved Objectives	Skills Requiring Improvement

23. Discuss the trend of the employee's performance over this review period. (Use descriptive terms such as, improving, consistent and declining.) Include an evaluation of participative behavior.

24. What progress has been made on performance improvement plans since your last review?

PART C: CAREER PLAN

25. Based on your knowledge of the employee's experience, skills and interests, summarize future objectives, both short and long term:

Short Term	Long Term

26. Summarize the actions that will need to be taken to achieve above objectives:

Action Plan	Target Completion Dates

Indicate the outcome of the performance appraisal discussion by checking the appropriate box below:

☐

YES, the supervisor and employee reached essential agreement on the information and conclusions contained in this form.

☐

NO, supervisor and employee failed to reach essential agreement and the differences are explained in the attached memorandum (initialed by employee, supervisor, and next management level).

Sign below to acknowledge you have read and discussed the subject matter in this form.

Employee Signature	Date
Supervisor Signature	Date
Manager Signature (if applicable)	Date