

Example Staff Performance Review Discussion

Job Role: Customer Service Manager

Name of individual	
Name of manager conducting discussion	
Date of meeting	

Company values	Comments	Rating
We treat all of our stakeholders with respect and care- whether colleagues, customers, the community, suppliers or investors. We strive to do better all the time.		
We are honest with ourselves and others, we don't have a problem saying 'I don't know', 'I was wrong' or 'I need help'.		
We go the extra mile to understand our customers and delight them every step of the way.		
We support each other and behave in a friendly and positive manner so that everyone can enjoy coming to work and give of their best.		
When things go wrong, we take responsibility and don't let go until we know an issue has been put right.		

Job deliverables	Comments	Rating
Attendance & punctuality <ul style="list-style-type: none"> • Has a good attendance record • Is punctual 		
Work ethic <ul style="list-style-type: none"> • Works hard in order to deliver the best possible result • Gets a lot done • Completes work in full and on time 		

<p>Conduct</p> <ul style="list-style-type: none"> • Presents and conducts him/herself in a professional, courteous, cheerful and friendly manner • Is trustworthy and reliable • Demonstrate a real sense of care for others • Is co-operative, flexible and helpful • Sticks with an issue and makes sure it is resolved quickly and well 		
<p>Business Knowledge</p> <ul style="list-style-type: none"> • Has a strong knowledge and understanding of our products and services • Has a strong knowledge and understanding of our procedures 		
<p>Skill</p> <ul style="list-style-type: none"> • Empathises with and creates confidence in customers and others • Deals with customers requests in an efficient and effective manner • Is well organised • Is well prepared to do his/her work • Follows up as appropriate • Keeps good notes and records 		
<p>Development</p> <ul style="list-style-type: none"> • Is open to new learning • Works on developing his/her own capabilities • Helps others to develop themselves • Thinks about, proposes and gets involved in initiatives to help the business to do better 		
<p>Leadership capability</p> <ul style="list-style-type: none"> • Demonstrates and consistently applies a strong set of values and principles: <ul style="list-style-type: none"> ○ Is honest ○ Treats others with courtesy and respect ○ Is courageous ○ Does not allow the behaviour of others to determine his/her own ○ Helps and encourages others to give of their best ○ Is enthusiastic, energetic and positive ○ Thinks before speaking ○ Is consistent in beliefs & behaviours ○ Looks for the good in others without being naive • Understands what the various stakeholders expect • Is effective- works on the right things • Is efficient- gets things done swiftly, on time, to a high standard and at the least cost and effort • Inspires and wins the confidence of people 		

Management capability <ul style="list-style-type: none"> • Is assertive but not aggressive • Is approachable • Is knowledgeable and skilled in <ul style="list-style-type: none"> ○ Recruitment ○ Motivation ○ Communication & meetings ○ Performance management ○ Skills development (training, coaching) ○ Counselling 		
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Episodic (timed) objectives	Comments	Rating
Objective No. 1 <ul style="list-style-type: none"> • What? • By when? • How will achievement be evidenced? 		
Objective No. 2 <ul style="list-style-type: none"> • What? • By when? • How will achievement be evidenced? 		
Objective No. 3 <ul style="list-style-type: none"> • What? • By when? • How will achievement be evidenced? 		

Additional comments:

Actions agreed:

Signature job holder		Signature manager	
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