

PERFORMANCE APPRAISAL EXAMPLE

RECEPTIONIST POSITION

| | |
|--------------------------|--|
| Employee's Name | |
| Manager's Name | |
| Date of Appraisal | |

Instructions for Completing the Appraisal Form

- Parts 1-3 should be completed before the appraisal meeting.
- The employee self rating is completed first and then the manager rating.
- Comments and examples should be provided where possible to support ratings.
- The employee and the manager should reach agreement on the ratings in the appraisal meeting.
- Ratings may be changed where appropriate after discussion.
- Part 4 should be completed at the end of the appraisal meeting.

Part 1: Job Performance

Circle the rating that matches your performance for each task (3=excellent, 2=good, 1=improvement required).

| Tasks | KPI's | Self-Rating | My Examples | Manager Rating | Manager's Examples |
|---|---|---------------------|--------------------|-----------------------|---------------------------|
| <u>Front Line Reception Duties</u> <ul style="list-style-type: none"> • Provide excellent front line service to customers. • Answer phone calls promptly and transfer to the appropriate person. • Take accurate messages. | <u>Customer Service</u> Target = no customer complaints (internal and external customers). | 3 2 1 | | 3 2 1 | |
| <u>Processing of Mail and Couriers</u> <ul style="list-style-type: none"> • Process mail promptly and accurately. • Send mail and courier packages by the most efficient and cost effective means. | <u>Budget Management</u> Target = mail and courier costs are within budget. | 3 2 1 | | 3 2 1 | |
| <u>Administrative Support</u> <ul style="list-style-type: none"> • Provide timely and accurate word processing support. • Carry out all admin duties competently and efficiently. | <u>Customer Service</u> Target = no complaints from internal customers. | 3 2 1 | | 3 2 1 | |

Part 2: Competencies

For each competency, circle the number beside the description that best matches your attitude or behaviour.

| Competency | Description | Self-Rating | My Examples | Manager Rating | Manager's Examples |
|-------------------|---|--------------------|--------------------|-----------------------|---------------------------|
| Customer Service | Makes an exceptional effort to keep customers satisfied. Works long hours if necessary to meet deadlines or fix problems. | 3 | | 3 | |
| | Gives friendly, cheerful service and corrects problems promptly. Makes visitors feel welcome and presents an excellent initial impression of the company. | 2 | | 2 | |
| | Does not always understand customer needs. Provides the minimal required service. | 1 | | 1 | |
| Results Focus | Takes full ownership of tasks and makes things happen. | 3 | | 3 | |
| | Works effectively without constant supervision and overcomes obstacles to complete tasks. | 2 | | 2 | |
| | Does the minimum required to keep the job. | 1 | | 1 | |
| Quality Standards | Thinks beyond own job and comes up with good ideas to improve systems and standards for the organisation. | 3 | | 3 | |
| | Keeps work space tidy with files and tools in good order. Double-checks the accuracy and quality of own work. | 2 | | 2 | |
| | Is disorganised and has an unacceptable rate of errors in work. | 1 | | 1 | |

Part 3: Overall Rating

| Description | Self-Rating | My Comments | Manager Rating | Manager's Comments |
|--|--------------------|--------------------|-----------------------|---------------------------|
| Staff at this level consistently exceed expectations and do more than is required in the role. | 3 | | 3 | |
| This is a positive and fully acceptable level of performance. KPI's are consistently achieved. | 2 | | 2 | |
| Staff at this level have not yet achieved proficiency in the role. | 1 | | 1 | |

Part 4: Development Plan

This section should be completed at the end of the performance appraisal meeting. You should agree with your manager on relevant action points for the subsequent 12 month period. The manager should monitor the deadlines for the Development Plan and ensure that all actions are completed on time.

| Actions | What needs to happen? | Who is responsible? | What is the deadline? | Sign Off when completed |
|---|------------------------------|----------------------------|------------------------------|--------------------------------|
| How can I improve my performance? | | | | |
| What training do I need? | | | | |
| What do I want to achieve to progress in my career over the next 12 months? | | | | |
| Other actions | | | | |