

COMPANY

Company Name: **ACME Inc.**

City: **Tokyo**

Department: **Administration**

Country: **Japan**

REVIEWER

First Name: **Jane**

Last Name: **Public**

Position: **Chief Executive Officer**

Email: **janepublic@acmeinc.com**

EMPLOYEE

First Name: **John Q.**

Last Name: **Citizen**

Position: **Customer Relations Executive**

Review Date: **09 March 2016**

PERFORMANCE EVALUATION

ATTENDANCE & PUNCTUALITY



Employee regularly fails to meet attendance requirements. May fail to notify when absent.



Shows inconsistency in attendance. Leave allowances may be stretched to the limit or exceeded.



There may be an occasional incident of absence or lateness, but no evidence of systematic or chronic lateness or absence.



Provides notification and reasonable explanation for absences. Tries to help plan ahead for coverage in the case of absence.



Rarely absent or late to work. Provides ample notification time for absences. Schedules time off thoughtfully.

COMMUNICATION

-  Regularly fails to communicate, listen to or correctly understand information, instructions, complaints, etc.
-  Shows inconsistency in communication. Written or oral communication may be inadequate, and may leave others confused or ill-informed.
-  Shows an understanding of the need to respond to information in a complete manner. Oral and written communications are acceptable.
-  Oral and written communications are good, comprehensible, and appropriate. Involves the right people in discussions.
-  Excellent oral and written communication. Quickly understands the significance of information communicated and skilled in reducing complex information to simple form.

DEPENDABILITY

-  Fails to act in a dependable manner. May make judgments that do not align with organizational values, resources or budgets.
-  Shows inconsistent dependability. Would benefit from gathering data and/or input from others. May rely too heavily on supervision or reminders.
-  Is dependable. Makes decisions after exploring various courses of action. Includes the appropriate people in the decision-making process.
-  Initiates both tasks and projects authoritatively and wisely, after exploring various courses of action. Includes the appropriate people.
-  Frequently takes a leading role. Seen as highly dependable. Considers the long and short-term effects of decisions.

PERSONAL APPEARANCE & IMAGE

-  Fails to meet the appearance requirements for the job. Unacceptable appearance may alter the perceptions of others. Hygiene causes discomfort for others.
-  At times, appearance may be incompatible with the position or the organization's expectations. Hygiene sometimes causes discomfort for others.
-  Appearance consistently fits the occasion and audience.
-  Appearance always suits the occasion and audience and is viewed favorably by others.
-  Always displays a high level of appearance suitability, often demonstrating leadership by example.

INTERPERSONAL SKILLS

-  Style of relating to others is frequently inappropriate and appears to cause many avoidable and sometimes quite serious problems.
-  Shows inconsistency in interpersonal conduct. May benefit from building more constructive relationships.
-  Has good relationships with most immediate peers, supervisors and customers. Recognizes importance of building and maintaining positive work relationships.
-  Takes a leading role in building team spirit and encouraging trust and cooperation among others.
-  Always has a positive outlook and respectful manner. Values diversity, accepts others. Stimulates teamwork and good attitude in others.

ADAPTABILITY

-  Uncomfortable with change. Shuts down in tough situations, and misses the verbal/non-verbal cues of others.
-  Does not easily adapt to changes in plans, and may not understand how to modify actions to respond to changes.
-  Able to adjust behavior to fit the situation. Fairly open to personal feedback. Adapts and changes as situations arise.
-  Open to personal feedback from all levels. Engages in open dialogue about possible solutions to change with appropriate parties.
-  Superior at adjusting behavior to fit the situation and people, sometimes anticipating change and coming prepared with new approaches.

RESPONSIBILITY & ACCOUNTABILITY

-  Consistently fails to understand and assume responsibilities. Reluctance to take ownership results in undesired consequences.
-  Has basic understanding of own role and responsibilities, but sometimes fails to meet expectations. Usually requires assistance to rectify problems.
-  Has good understanding of responsibilities. Sometimes lacks understanding of others' roles, leading to inefficiencies. Takes accountability of actions most times.
-  Always takes responsibility and accountability for own activities and actions. Personally rectifies undesired results and consequences.
-  Has exemplary understanding of own role and responsibilities and those of others. Consistently exceeds expectations. Holds self and others accountable.

TEAMWORK



Not a team player. Seems resistant and uncomfortable working with others.



Needs improvement working with others. May prefer to work alone, when a team effort is required.



Effectively works with others. Able to resolve conflicts and listens to others.



Demonstrates skills in resolving conflicts, fostering integrity and trust, and listening to others. Shares resources with others.



Outstanding team player. Collaborates easily and encourages others to work together to find solutions. Regularly communicates progress.

PERFORMANCE UNDER PRESSURE



May 'crack' in high-pressure situations. May lose cool and wind up saying or doing inappropriate things.



Struggles in high-pressure situations. May lose composure and become less effective when things get stressful. Appears nervous.



Able to handle the unexpected and stay calm. Seldom gets rattled in high stress situations. Responds well during tough times.



Great at handling the unexpected. Can cope with frustration when faced with criticism or obstacles, employing various appropriate skill sets.



Has a very calming effect on others in high stress situations. Able to lead others toward appropriate steps.

ABILITY TO SUPERVISE



Unclear communicator. Fails to set goals, targets, or objectives.



Starts projects without clearly identifying goals and tasks. May distribute work unequally.



Establishes clear directions, distributes workload equitably. Has plans and communicates them.



Sets goals and objectives slightly higher than most people's comfort zone, stretching individuals and the group to even higher performance.



Extremely equitable manager. Effectively rotates a variety of tasks to different people. Informs, listens and explains.

LEADERSHIP



Does not demonstrate the ability to obtain the desired results through the work of others.



May struggle to lead. Is not currently comfortable standing out or being looked to in a crisis.



Open-minded and flexible in thoughts and tactics. Able to deal with complexity. Effectively guides and directs others.



Highly effective in a leadership position. Solid strategic and operational decision making skills. Finds creative ways to motivate people.



Extraordinary leader. Well-connected with individuals and groups, able to motivate and mobilize the right people to accomplish strategic goals.

JOB KNOWLEDGE

-  Unable to complete the normal or typical work tasks of the job without considerable guidance and support from others.
-  Some tasks may be left incomplete or completed incorrectly. Limited job knowledge. Does not keep abreast of changes.
-  Able to complete all routine tasks independently. Understands and performs most phases of job well.
-  Able to complete all normal and difficult tasks independently, seldom requiring assistance. Keeps abreast of changes in areas of expertise.
-  Expert in job. Generally thought of as exemplary and the person others go to for advice on difficult problems.

MEETING DEADLINES & TIME-MANAGEMENT

-  Wastes time on issues of little importance because doesn't set priorities. May approach work randomly and is easily distracted. Often misses deadlines.
-  May lose valuable hours getting side-tracked on non-priority tasks. Often requires micro-managing. May miss deadlines.
-  Good at setting priorities. Plans schedules carefully and allocates time to the most important priorities. Provides prior advice if deadlines unable to be met.
-  Organizes schedule thoroughly and identifies effective ways to save time by combining tasks and prioritizing. Meets deadlines.
-  Carefully plans activities and works efficiently and never wastes time doing unnecessary tasks. Very strong ability to delegate and follow up. Always meets deadlines.

PRODUCTIVITY & WORK QUALITY

-  Demonstrates inattention to quality that regularly necessitates the reassignment of job tasks. Work regularly necessitates reassignment of tasks.
-  Completes tasks, but the work output does not consistently achieve desired and/or required outcomes, or only partially achieves them.
-  Work output regularly achieves its required outcomes, with an error/problem rate that is acceptable or typical for this work.
-  Displays a high level of work output. Some work tasks are completed ahead of time and most are high quality.
-  Can self-monitor their own output. Work is well known by peers and may have a reputation for setting the standard. Seeks out extra tasks or projects to undertake.

CREATIVITY

-  Over-values traditional approaches and may offer old solutions to new problems.
-  Rarely experiments with new approaches. Relies too much on what is known about own area and doesn't seek broad connections.
-  Generates new ideas and offers suggestions to improve the way things are done. Contributes effectively to brainstorming sessions.
-  Considers many factors and uses experience and opinions of others to develop solutions. Seen as an original and creative thinker.
-  Creative and enthusiastic approach has a very positive impact on the organization. Comes up with brilliant and original ideas.

PROBLEM SOLVING



Rarely asks others for help or advice. Solutions are often based on incomplete data and inaccurate assumptions.



May solve problems with solutions that are partially effective. Does not seek appropriate advice when unusual situations arise.



Regularly demonstrates the ability to solve difficult problems with effective solutions in a timely manner.



Able to view situations objectively. Learns from past decisions. Clear-headed and unbiased when making important decisions.



Anticipates problems and prevents them. Takes a leading role in asking questions and probing all fruitful sources for answers.

ABILITY TO LISTEN & FOLLOW INSTRUCTIONS



Fails to meet the instruction requirements of the job. Interrupts, or fails to solicit feedback altogether.



Needs improvement in taking direction/ instruction. Would benefit from checking for understanding, or restating to ensure understanding.



Attentive. Listens to direction/ instruction. Allows other the opportunity to speak, and considers the opinions of others.



Can accurately restate the directions/ instructions of others even when he/she disagrees. Able to assist others in clarifying their thoughts.



Is widely regarded as a good listener who demonstrates great understanding with rare instances of miscommunication.

ABILITY TO WORK INDEPENDENTLY

-  May fail to set accurate objectives and goals. May overlook developing schedules or timelines, leading to wandering projects.
-  Schedules and tasks sometimes reveal a lack of attention to detail and as a result some supervision is required.
-  Able to accurately scope out length and difficulty of tasks and projects, and breaks down work into the necessary steps.
-  Establishes timelines and milestones. Anticipates obstacles and has contingency plans to overcome challenges.
-  Clearly communicates plans, creates frameworks for communication and designates milestones for measuring success.

COMPLIANCE WITH ORGANIZATIONAL POLICIES & PROCEDURES

-  Fails to act in accordance with organizational policies and procedures.
-  May not provide notification and reasonable explanation for lapses in judgement regarding policies and procedures.
-  Can be trusted or relied upon to act in the way required or expected of the organization.
-  Guides others in behavior and work standards. Demonstrates the ability to be trusted.
-  Always offers support to co-workers and supervisor on policies and procedures. Takes responsibility for actions. Seeks to establish best-practice policy.

ETHICS & INTEGRITY

-  Fails to be seen as trustworthy. May violate confidences too frequently. Behavior may not reflect the standards of the organization.
-  Shows some inconsistency. There may be evidence of occasionally revealing personal confidences or blaming others for their mistakes.
-  Is seen as a direct, truthful individual. Applies own values when faced with challenges. Values trust and honesty.
-  Trusted with confidences. Always applies highest standard of ethics and integrity in role.
-  Sets and applies highest standard of ethics and values. Is sought out by others for guidance on larger ethical issues facing the organization.

JUDGEMENT & DECISION-MAKING

-  Fails to make sound and accurate decisions. May make judgments that do not align with organizational values, resources or budgets.
-  Shows inconsistency in judgment. Would benefit from gathering data and/or the input of others.
-  Makes decisions after exploring various courses of action. Includes the appropriate people in the decision-making process.
-  Initiates decision-making wisely, after exploring various courses of action. Considers the long and short-term effects of decisions.
-  Takes a leading role in making decisions, after exploring available actions, resources, and constraints.

RELATIONS WITH CO-WORKERS



May be resistant and uncomfortable working with peers. Rarely takes time to listen to others' perspectives.



Needs to improve interpersonal skills. Needs to actively listen and participate on a team.



Able to effectively manage interpersonal relationships in a cooperative, sensitive and collaborative manner. Listens and understands various points of views.



Expresses sensitivity when appropriate. Maintains positive relationships. Has earned the trust of others.



Is sought after on organizational teams. May lead organizational teams. Is seen as fair and trustworthy.

FINANCIAL MANAGEMENT



Employee does not understand the financial policies of the organization and regularly neglects compliance with them. Fails to meet budget.



Employee complies with financial policies but does not effectively contribute to the budgeting process. Often exceeds budget.



Employee complies with financial policies and contributes to the budget process satisfactorily. Meets objectives on budget.



Understand and complies with financial policies of the organization. Develops and manages budgets effectively. Meets objectives on or under budget.



Demonstrates exemplary management and reporting of financial resources. Consistently achieves objectives under budget.

CUSTOMER-FOCUS



May be unresponsive to customer concerns or fail to escalate issues appropriately. May frustrate customers with lack of follow-through.



Needs to focus more on customer needs. Needs to improve questioning techniques to understand customer needs.



Establishes and maintains effective relationships with customers and gains their trust and respect. Handles complaints effectively.



Includes the customer's perspective in group projects and meetings. Has a solid knowledge of customers and what they need.



Personally takes ownership for finding solutions to customers' immediate and future concerns. Drives to improve all customer processes.

OVERALL EVALUATION

John's first 12 months in this role have been encouraging. His efforts in improving the organizations relationship with customers have seen dramatic improvements in repeat business. John's work ethic is admirable, however, his ability to manage time, activities and team need improvement - but these are not uncommon observations or criticisms of someone newly elevate to a management position.

RECOMMENDATIONS

John needs to focus on the management of his time and also on improving the way he delegates and manages his staff. John should identify some management short-courses to attend over the coming 12 months.