

# Individual Review for Debra Example

## Confidential

**Job Title:** Quality Assurance Analyst

**Appraisal Form:** Individual Contributor

**Rater:** Marcia Example

**Review Period:** June 2006 - June 2007

### Conducting a Performance Appraisal Review Discussion:

The career discussion should be a forum for discussing past performance as well as determining development needs for the future. Use this form during the review to facilitate the career discussion. Highlight where there are similarities and discrepancies between your ratings and the employee self-ratings and use this information as a starting point to discuss expectations, specific performance issues, and development for the future.

- Be prepared. Know your ratings and the reasons behind them. Know what you want to achieve from the session.
- Remember that this should be a joint discussion. Listen to the employee's thoughts and reasoning, and their expectations.
- Provide specific examples that support your ratings. The more specific you can be, the more valuable the feedback.
- As part of the session, discuss future goals and objectives, as well as developmental areas. Focus on what you can do to help the person achieve these.



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Overall Performance:		Ratings	
<b>Key:</b> 1 = Unsatisfactory 2 = Needs Improvement 3 = Meets Standard 4 = Above Standard 5 = Exceptional		Manager <b>1</b> • • ▲ <b>5</b>	Self <b>1</b> • • ▲ <b>5</b>
Comments			
<b>Marcia Example:</b> <i>Debra has come a long way since her last review. She has successfully trained someone to handle Quality Control Specs and has been their support person. She has helped to guide and develop other team members and has become the go to person in the department.</i>		<b>Debra Example:</b> <i>I feel I am an extremely valuable asset to this Dept., as well as to the company as a whole. I have worked very hard to adjust my "approach" so as to be perceived as a team player willing to share my experiences and expertise.</i>	

Readiness for Promotion:		Ratings	
<b>Key:</b> 1 = Not Promotable Above Current Level 2 = Over 12 Months 3 = 3 - 12 Months 4 = Immediate 5 = Already Promoted		Manager <b>1</b> • • ▲ <b>5</b>	Self <b>1</b> • • ▲ <b>5</b>
Comments			
<b>Marcia Example:</b>		<b>Debra Example:</b>	

**Additional Notes:**

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Relationship Management	Ratings
Actively builds and maintains relationships within, across and outside the organization and personalizes work relationships to support business goals	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5
Allocates time and effort to understanding and meeting the needs of internal or external customers	Manager: 1 • ▲ • 5 Self: 1 • • ▲ 5
Displays good social skills	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5
<b>Overall Competency Rating</b>	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5

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Comments	
<p><b>Marcia Example:</b> <i>Debra has improved over the last year in taking the time to listen to others before offering her opinion. This has not only allowed her to be the expert in her area but also someone who can be approached to help find a solution to a problem.</i></p>	<p><b>Debra Example:</b> <i>I have developed many very good relationships, both within the company and the outside customer and vendor community, over the past 26 years. I believe I have made great progress in the area of what others may have interpreted as "abruptness". I have also made great strides in the area of listening completely before offering my own opinion.</i></p>

**Additional Notes:**

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Adapting To Change	Ratings	
Accepts change openly and willingly	Manager:	1 • • ▲ 5
	Self:	1 • • • ▲
Readily adapts and adjusts to new or changing circumstances	Manager:	1 • • ▲ 5
	Self:	1 • • • ▲
<b>Overall Competency Rating</b>	Manager:	1 • • ▲ 5
	Self:	1 • • • ▲

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Comments	
<p><b>Marcia Example:</b> <i>Debra has improved in this area compared to where she was last year. She still maintains a wait and see attitude but does not let this interfere with getting results or implementing new processes with the team.</i></p>	<p><b>Debra Example:</b> <i>I have experienced many changes during my years at this company and have learned to embrace these changes. I am always very conscious to pass on the "positive" aspects and excitement of any changes that may be happening, not only to my team members, but to others around me.</i></p>

**Additional Notes:**

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Integrity	Ratings
Is ethical and honest in all his/her business dealings and his/her dealings with people	Manager: 1 • • • ▲ Self: 1 • • • ▲
Holds him/herself to a high standard and will do what is right in spite of the consequences for him/herself	Manager: 1 • • • ▲ Self: 1 • • • ▲
Delivers what he/she has promised	Manager: 1 • • • ▲ Self: 1 • • • ▲
Is worthy of the personal trust of others and treats people in a respectful manner	Manager: 1 • • ▲ 5 Self: 1 • • • ▲
<b>Overall Competency Rating</b>	Manager: 1 • • • ▲ Self: 1 • • • ▲

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Comments	
<p><b>Marcia Example:</b> <i>Debra is ethical and honest in her dealings with others. Debra delivers what she promises regardless of what it takes to meet the deadline. At times she has worked through the weekend to get a projected done. A good example of this is the Quality Control spec projected not only was it done ahead of schedule but she was able to train another team member to help meet the deadline.</i></p>	<p><b>Debra Example:</b> <i>I have an extremely high work ethic. I am very honest and am able to keep things confidential when required to. I expect the same from everyone I work with and for.</i></p>

**Additional Notes:**

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Teamwork And Collaboration	Ratings	
Builds and maintains cooperative work relationships with others	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5	
Listens to and values the input of others and collaborates well with others	Manager: 1 • ▲ • 5 Self: 1 • • • ▲	
Collaborates effectively in meetings and informal interactions	Manager: 1 • ▲ • 5 Self: 1 • • ▲ 5	
Commits to supporting the larger group effort and assists others in the completion of their tasks to support group goals	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5	
<b>Overall Competency Rating</b>	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5	

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Comments	
<p><b>Marcia Example:</b> <i>Debra has maintained good working relationships with other areas which includes the warehouse, Inventory Control, Finance, vendors and brokers. She has also been more involved over the last year in helping the team complete daily tasks as needed. Debra has improved over last year in her ability to listen to others before offering input. This has made her more effective in meetings. Debra needs to work on her visible emotional reaction to some situations that can be viewed by others as a negative.</i></p>	<p><b>Debra Example:</b> <i>I feel I have made great improvement in this area. I am constantly trying to keep the morale high on my team, as well as within other areas of the department and company that I may have contact.</i></p>

**Additional Notes:**

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Delivering Results	Ratings
Assumes personal responsibility for achieving outcomes	Manager: 1 • • ▲ 5 Self: 1 • • • ▲
Works effectively with little guidance	Manager: 1 • • ▲ 5 Self: 1 • • • ▲
Is dependable and responsible and finishes what he/she starts	Manager: 1 • • ▲ 5 Self: 1 • • • ▲
Works on the right tasks	Manager: 1 • • ▲ 5 Self: 1 • • • ▲
<b>Overall Competency Rating</b>	Manager: 1 • • ▲ 5 Self: 1 • • • ▲

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### Comments

**Marcia Example:** *Debra works hard to deliver what she has promised in a timely manner. If she is unable to complete a task by the designated time she communicates where she is and establishes a new deadline.*

**Debra Example:** *I am a very committed employee. I will do whatever is necessary to complete a project accurately and on time, or communicate immediately if it is not achievable. I am completely aware of the impact my team has on the "big picture", and work extremely hard to keep this in the forefront of all decisions that I am involved with.*

**Additional Notes:**

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Functional Acumen	Ratings
Displays a high level of competence in the functional areas of his/her job	Manager: 1 . . . ▲ Self: 1 . . . ▲
Actively seeks assignments and roles that expand or improve his/her functional abilities	Manager: 1 . . ▲ 5 Self: 1 . . . 5
Has a level of functional expertise that allows (would allow) him/her to train and educate others	Manager: 1 . . . ▲ Self: 1 . . . ▲
<b>Overall Competency Rating</b>	Manager: 1 . . . ▲ Self: 1 . . . ▲

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Comments	
<p><b>Marcia Example:</b> <i>Debra is an expert in her area as well as has experience with other departmental processes and procedures. She has trained many buyers and team members on how to read and interpret key reports. This has allowed her to take on more responsibilities.</i></p>	<p><b>Debra Example:</b> <i>I am an extremely competent employee. I have gained much knowledge over the years, most of it "self taught". I enjoy being able to pass on my experience and insight to any one who asks. I am thrilled with the new systems that have been added over the past year. They have made the ability to perform my job much more efficient and have condensed a lot of my knowledge into faster performing tasks.</i></p>

**Additional Notes:**



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Planning And Organizing	Ratings	
Sets realistic goals and manages progress toward goal completion	Manager: 1 • ▲ • 5	Self: 1 • • ▲ 5
Develops contingency plans in anticipation of possible obstacles	Manager: 1 • • ▲ 5	Self: 1 • • ▲ 5
Effectively manages his/her own time and the time of others	Manager: 1 • • ▲ 5	Self: 1 • • • ▲
Effectively manages multiple projects, demands and competing deadlines	Manager: 1 • • ▲ 5	Self: 1 • • • ▲
<b>Overall Competency Rating</b>	Manager: 1 • • ▲ 5	Self: 1 • • ▲ 5

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Comments	
<p><b>Marcia Example:</b> <i>Debra does a great job of managing her desk to keep current. She also reacts to the teams need to stay on task. Debra would benefit from more proactive planning to handle when someone is out or if a large time sensitive tasks comes along.</i></p>	<p><b>Debra Example:</b> <i>I feel I am excellent at managing my time/desk, and making sure my team's work is completed on time. I am constantly helping to redistribute their workloads in order to achieve the goals necessary for successful completion of all tasks. I am also very good at multi-tasking and can switch priorities on a moments notice (or as needed).</i></p>

**Additional Notes:**

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Communication Skills	Ratings
Is able to organize and articulate his/her thoughts well in writing	Manager: 1 • ▲ • 5 Self: 1 • ▲ • 5
Engages the audience and delivers smoothly	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5
Prepares and delivers well structured, clear oral presentations	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5
Articulates thoughts and ideas clearly in informal situations	Manager: 1 • ▲ • 5 Self: 1 • ▲ • 5
<b>Overall Competency Rating</b>	Manager: 1 • ▲ • 5 Self: 1 • ▲ • 5

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Comments
<p><b>Marcia Example:</b> <i>Debra is well spoken and comfortable speaking to an audience. Sometimes she needs to pause to allow others with less experience or knowledge time to think through what she has said.</i></p> <p><b>Debra Example:</b> <i>I am the first to admit that my skills in the area of writing down procedures and thoughts is one of my weaker areas. I have made some progress with this, but not nearly as much as I would have liked. I am very comfortable expressing myself, and passing along my thoughts and expertise, verbally. I have made great strides in the area of "knowing my audience".</i></p>

**Additional Notes:**

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Decisive Judgment	Ratings
Makes good decisions in a timely manner	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5
Wisely considers alternatives and possible consequences	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5
Takes personal responsibility for making decisions	Manager: 1 • • ▲ 5 Self: 1 • • • ▲
<b>Overall Competency Rating</b>	Manager: 1 • • ▲ 5 Self: 1 • • ▲ 5

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Comments	
<p><b>Marcia Example:</b> <i>Debra is able to make good decisions based on her experience. She has also become more comfortable about making decisions without management support even though some may not have had the desired results.</i></p>	<p><b>Debra Example:</b> <i>I am very confident in my knowledge and in my ability to make sound decisions. I have made ( and will continue to make) progress in the area of not always asking "permission" from upper management, but making the decision on my own, and as always, keeping the company's best interest in the forefront. This is a relatively new area for me because in the past, I wasn't "allowed" to make any critical decisions on my own, even though I possessed the knowledge to do so.</i></p>

**Additional Notes:**

