

On-line Review Help & Guidance Manual



The on-line managers toolbox



Employee name:

Q.1

How do you rate the overall progress made against the specific development objectives agreed at the last review.

During the actual one-line review preparation process, at this point you will automatically be presented with the previously agreed development objectives. To what level have these been met? Please select one of the options below:

- a. **Exceptional:**
 - All objectives met and more - Excellent work
 - Progress against the planned objectives could not have been better - 1st class rating
 - Suggest caution used when applying this

- b. **Very Positive:**
 - Very high level of achievement, all objectives met - Significantly better than average rating

- c. **Above Average:**
 - A good achievement with most if not all objectives being met - Slightly higher than average rating

- d. **Average:**
 - Reasonable result with the main objectives being met

- e. **Poor:**
 - Disappointing result with key objectives not being met. You may feel this person can do much better but is not trying

- f. **Very Poor:**
 - Totally unacceptable performance against the plans set. This level of non achievement signifies an inability or reluctance to work within the development process you provide - Must do better rating

Tick your selected rating:

a. b. c. d. e. f.

For consideration:

- This question applies to performance against the previously agreed development objectives only. The development plans agreed at the last review.
- The following sections allow for more general comments linked to overall progress.



Employee name:

Q.1

When considering this individuals skill profile – Can you clearly identify areas of improvement?

[If no move directly to Q3](#)

Please select one of the options below:

- a. **No – You feel more could have been achieved by this person – Poor result:**
 - You do not see any real signs of development
 - You are not very impressed – Must do better rating

- b. **No – Could be a result of circumstances outside of the employees control:**
 - Little if any progress, however this is influenced by factors outside of the employee's direct control
 - You are reasonably happy with their effort - Average rating

- c. **Yes – Some examples, reasonably good result:**
 - Some progress, OK performance
 - You are reasonably happy - Average to good, not exceptional rating

- d. **Yes – Notable / Significant examples, excellent result:**
 - Very good progress, exceptional performance - Very high rating

Tick your selected rating:

a. b. c. d.

For consideration:

- Your answer to this question helps to establish your overall impression of this person's performance in the previous period.
- Here you are considering all skill development, not purely those areas targeted at the last review.



Employee name:

Q.2

Within which areas is this improvement demonstrated?

For consideration:

- If you selected [a] or [b] in Q.1 **DO NOT** select from these options. Ensure all boxes display 'None' & move to Q3. Failure to observe this will adversely affect the presentation of your finished report.
- You have the choice to show up to 5 development areas. Use your scoring sheet (Print option available after scoring section is completed) to help you confirm areas where an increased rating has been applied.
- Improvement should not be logged here unless an increased rating is recorded in the scoring section.
- Each menu presents you with your unique list of top level skills and sub skills. The areas you can select from are indented with >>.
- Selecting a none indented heading will adversely affect your report content - No skill will be shown as this is a **skill area title** and not a specific skill.

Q.3

Add your personal comments regarding the level of effort applied by the individual & results achieved

For consideration:

- In this section you must concentrate on two independent areas:
 1. Effort applied
 2. Results achieved

These two areas are not always interlinked and performance can vary between them.

- To maintain the continuity of the report you must start your comments with the text provided:

"The effort applied by you in the period has been"

Failure to observe this will adversely affect the presentation of your finished report.

- The free text fields within the review are designed for you the reviewer to personalise your work. It is the comments in these sections that will individually differentiate the performance of your staff. A minimum of 25 words must be used, however we promote you make best use of the 300 word limit.

We strongly promote you include things like:

- a. The persons name
- b. Unique events

We also suggest you:

- a. Are never vague
- b. Apply praise where due
- c. Identify weakness
- d. Offer constructive advice

- **Vagueness will not make for a good report and will not get across a strong message - Whatever the performance!**

Please utilise the separate sheet (P.5) provided to formulate your free text:

Employee name:

Q.1

Which of the following statements applies most strongly to your organisation at present?

This question is trying to establish how your organisation views the strategic direction it is taking and the overall results it is achieving. Please select one of the options below:

- a. **Is happy with the scope and performance of its current capabilities:**
 - Happy with the direction, progress is generally good and there are minimal, if any changes planned

- b. **It is looking to improve performance in existing capabilities:**
 - Happy with the direction, however progress is too slow and more focus is required to increase the rate of change

- c. **It is working hard to realign its capabilities to meet new challenges:**
 - Facing new challenges & needs to establish new goals to keep the organisation moving forward

Tick your selected rating:

a. b. c.

For consideration:

- In general, how do the people directing your company view the needs of your market and your organisations broad performance in your operating sector?
- This question is associated with top level plans and targets. Before answering ensure that you have obtained accurate data from an authorised source.
- If you are in the process of completing an on-line review and do not have the required information, the process to interrupt the on-line review preparation process is as follows:
 - ① Select the **<< back** to list option at the top of the page
 - Takes you to this persons **Review list**
 - The review is now on hold pending completion
 - This can be done at your leisure
 - ② To re-gain access into the review click the review **edit** tab and you will be taken to the **scoring page**
 - ③ Use the **Next>>** tabs to proceed to the point at which you left the review
 - Your data saved up to point you left the review

Employee name:

Q.2

In broad terms how does your company define its progress against these objectives in the period?

Here you are still considering your organisations top level goals and objectives. Use this question to capture how your organisation is performing against these plans. Please select one of the options below:

- a. **Consistently positive:**
 - Progress is good and the results are either in line with or exceed expectations
- b. **Varied but generally positive:**
 - Although some not so positive areas, generally progress is deemed to be reasonable
- c. **Varied but generally below target:**
 - There may be isolated examples of reasonable results, however in general performance must improve
- d. **Poor with few exceptions:**
 - Consistently poor performance, bad result

Tick your selected rating:

a. b. c. d.

For consideration:

- This question is associated with top level plans and targets. Before answering ensure that you have obtained accurate data from an authorised source.
- If you are in the process of completing an on-line review and do not have the required information, the process to interrupt the on-line review preparation process is as follows:
 - ① Select the **<< back** to list option at the top of the page
 - Takes you to this persons **Review list**
 - The review is now on hold pending completion
 - This can be done at your leisure
 - ② To re-gain access into the review click the review **edit** tab and you will be taken to the **scoring page**
 - ③ Use the **Next>>** tabs to proceed to the point at which you left the review
 - Your data saved up to point you left the review

Employee name:

Q.3

Select the phrase that most accurately reflects any link between this individual's contribution and the company performance

Now we are looking to try to link the performance of your staff to the performance of your organisation. Please select one of the options below:

a. **Clear well defined links to our organisations positive performance in one or more areas:**

- **More than one** clear link can be identified and quantified. For example:
 - ① You operate in a call centre environment, the company has improved it's customer satisfaction rating and the employee has made a notable improvement in the area of telephone etiquette
 - ② You work in a manufacturing environment, the company has improved it's stock turn performance and the employee has been identified as showing improved awareness of stock control methods.

b. **Some limited indication to a positive contribution towards our companies objectives:**

- Same criteria as above, with a **minimum of one** example.

c. **Reasonably positive company performance towards our company objectives – Difficult to establish a clear link to the persons performance:**

- If these criteria are met then use this ranking and provide more detail in Q.4 free text field
- An individual showing **positive** or **negative** contribution can be ranked at this level

d. **Positive performance by this individual, poor overall company performance against our top level objectives:**

- If these criteria are met then use this ranking and provide more detail in Q.4 free text field

e. **Some indication of a link between the individual's poor performance and poor results within our top level objectives:**

- This ranking is used when scenarios similar to those below are evident:
 - ① Company only achieved 80% attendance against a 96% target, this employee achieved 25%
 - ② Employee failed to improve their understanding of in-house quality systems and the company failed to improve it's measured quality performance
- Q.4 free text field must be used to effectively quantify why this rating has been used

Tick your selected rating:

a. b. c. d. e.

For consideration:

- Skill development without links to the organisations performance could have it's real value questioned.
- It's important to align your selection with the opinions you have noted earlier in the report.

Employee name:

Q.4

Where applicable try to provide clear examples of this individuals influence (good & bad) on your companies performance against its key measures.

For consideration:

- Use this area to build on your ratings applied to questions 1-3 in this section.
- Concentrate on quantifying your ratings through the use of specific examples.
- The more detail you provide, the more substance you have with which to conduct the review.
- Be prepared to explain the detail that substantiates your choices.
- To maintain the continuity of the report you must start your comments with the text provided:

"Examples of this"

Failure to observe this will adversely affect the presentation of your finished report.

- The free text fields within the review are designed for you the reviewer to personalise your work. It is the comments in these sections that will individually differentiate the performance of your staff. A minimum of 25 words must be used, however we promote you make best use of the 300 word limit.

We strongly promote you include things like:

- a. The persons name
- b. Unique events

We also suggest you:

- a. Are never vague
- b. Apply praise where due
- c. Identify weakness
- d. Offer constructive advice

- **Vagueness will not make for a good report and will not get across a strong message - Whatever the performance!**

Please utilise the separate sheet (P.10) provided to formulate your free text:

Employee name:

Q.1

How would you describe this individual's level of effort and general approach towards their own development?

The **select from** menu offers a diverse range of responses to this question. Your completed reports will benefit from utilising the full scope of answers available. Please select one of the options below:

- a. **Very high – Well organised – Positive:**
 - The employee's self motivation and drive is excellent – Second to none
 - The level of contribution is likely to be well recognised within the organisation
- b. **Reasonable on most occasions:**
 - Consistent level of reasonably positive motivation
 - Will demonstrate a desire to learn
- c. **Showing signs of decline - Disappointing:**
 - Level of motivation and / or effort is lower than you have previously experienced
 - Is likely to be linked to a person you know can offer more and you want to help improve
- d. **Much improved from previous efforts:**
 - The employee has been previously linked to either inadequate ongoing effort or may have demonstrated an *out of character* downturn in a previous review
 - They are now clearly making a conscious and obvious effort to improve their perceived status
 - Is clearly applying a high level of effort to develop contribution and associated rating
- e. **Very poor – Consistently uninterested:**
 - This employee is not applying even your minimum expected level of effort
 - There appears little interest in learning new skills or contributing towards the company goals
 - Rating at this level promotes your recognition of unacceptable performance and Q.2 free text field must be used to quantify you view in more detail

Tick your selected rating:

a. b. c. d. e.

For consideration:

- In this question ensure you base your rating on the **review period** only, ensuring that your rating applies to their effort applied and general approach towards self development.



Employee name:

Q.2

Summarise and add your personal comments related to this individual's overall skill set development:

For consideration:

- When making your comments in this section you must link them to this individuals personal skills profile development
- Do not use this opportunity to make comments linked to more general contribution. Section 6 Q.2 later in the report caters for and asks for your more general views and opinions linked to this person.
- Ask yourself two basic questions:
 - ① Are they developing new and existing skills?
 - ② Is the organisation making use of these?

Build your scrip around these simple areas.

- To maintain the continuity of the report you must start your comments with the text provided:

" *During the period I have noticed* "

Failure to observe this will adversely affect the presentation of your finished report.

- The free text fields within the review are designed for you the reviewer to personalise your work. It is the comments in these sections that will individually differentiate the performance of your staff. A minimum of 25 words must be used, however we promote you make best use of the 300 word limit.

We strongly promote you include things like:

- a. The persons name
- b. Unique events

We also suggest you:

- a. Are never vague
- b. Apply praise where due
- c. Identify weakness
- d. Offer constructive advice

- **Vagueness will not make for a good report and will not get across a strong message - Whatever the performance!**

Please utilise the separate sheet (P.13) provided to formulate your free text:

Employee name:

Q.1

Which of these comments best captures your overall impression of this person's general performance in the last 12 months?

Your printed report uses your answer to this question to establish suitable introductory comments that represent your impression of this persons **overall performance** in the period. Here you are considering not only development, but a more holistic view of their contribution. Please select one of the options below:

- a. **Excellent – Significantly stronger than expected:**
 - Overall performance is of the highest possible calibre and beyond all expectations
 - you are extremely impressed
 - **Use with caution** as this is a "**Can not do better**" rating

- b. **Very good – Higher than average performance:**
 - Very good progress at a level a little higher than expected or required
 - You are very happy with their above average contribution. A "**Very good**" rating

- c. **Good and in line with your general expectations:**
 - Good progress in line with your general expectations
 - No real concerns. A "**Good to average**" rating

- d. **Reasonable, however could be improved:**
 - Has slightly underperformed against their potential, overall performance could be improved on
 - This signifies a reasonable contribution that could be better if more effort applied.
 - You want this person to do better and will give the support required. A "**Can do better**" rating

- e. **Slightly below your expectations:**
 - Has not met your required level of contribution, progress has been quite poor and must improve
 - You may feel progress can be made if more effort is applied by this person – A "**Quite poor**" rating

- f. **Significantly below expectations:**
 - Well below your expected standard
 - Signifies a lack of aptitude or, more likely, a lack of interest from the person to apply themselves.
 - Generally uninterested & difficult to motivate. This is a "**Very poor - Must do better**" rating
 - Someone receiving this has reached a point where further reluctance to amend their approach may initiate further attention.

Tick your selected rating:

a. b. c. d. e. f.



Employee name:

Q.2

Do you require this individual to increase their personal efforts towards their development of new skills in the following period?

Please select one of the options below to develop the end report to show clearly if you feel the person being reviewed needs to either:

- a. **Yes:**
 - Apply more effort to meet your expectations

- b. **No:**
 - Continue at current level as you are happy with their level of effort

Tick your selected rating:

a. b.

For consideration:

- Ensure your choice here is consistent with previous ratings. Failure to do this will effect the consistency of views shown in your end report

Q.3

Will there be new areas of focus within the organisations objectives in the following period?

Please select one of the options below to develop the end report to show your company as requiring:

- b. **Yes:**
 - New emphasis in the areas you will go on to select in Q.4

- c. **No:**
 - Continued emphasis in those areas already shown in Q.4

Tick your selected rating:

a. b.

For consideration:

- During the *on-line report prep process* you are presented with the objectives shown at the last review.

- If in doubt regarding the answer to this question, hold the report development process and obtain details from an appropriate colleague. See section 3 Q.1 notes for how to put the process on hold.

Employee name:

Q.4

Our organisations objectives in the following period will be linked to - *Must select a min of one area*

During the actual on-line review completion process the objectives established for your company at the last review are shown above each of the 5 drop down menus.

For consideration:

- If you selected:
 - ① [a – Yes] in Q.3 you must now make your modifications
 - ② [b – No] in Q.3 then confirm the objectives showing are correct and re-select these from the drop-down menu
- It **is** possible to modify objectives after making an [a – Yes] selection at this point – The system will not stop you. However, we promote that if you wish to add or amend objectives, selecting option [b – No] will provide you with a more cohesive end report
- You must apply a minimum of **one** objective and have the opportunity of applying up to **five**
- Failure to select a minimum of one will prompt an error as you try to proceed to the next section
- The select options are generated by your system administrator. Should you find that the options you expect to see are not available, suspend the review and discuss with your system administrator / Appropriate member of staff
- Process to interrupt the on-line review preparation process is as follows:
 - ① Select the **<< back** to list option at the top of the page
 - Takes you to this persons **Review list**
 - The review is now on hold pending completion
 - This can be done at your leisure
 - ② To re-gain access into the review click the review **edit** tab and you will be taken to the **scoring page**
 - ③ Use the **Next>>** tabs to proceed to the point at which you left the review
 - Your data saved up to point you left the review

Employee name:

Q.5

This individuals development objectives in the following period will be - *Must select min of one area:*

During the actual on-line review the bespoke departmental sub-skills and appropriate personal attributes are shown within each of the 5 drop down menus. Your selections in these fields form the basis for this individuals outline training plan for the following period.

For consideration:

- You must apply a minimum of **one** development area and have the opportunity of applying up to **five**
- Failure to select a minimum of one will prompt an error as you try to proceed to the next section
- The select from menus are made up of the unique skill set created and applied to this department. The main **skill area header** is shown first and then indented beneath are the **sub skills** - The actual **measured** skills. For example:

Name of skill area heading	-	Not to be selected – This is a <i>skill area header</i>
>> Actual measured skill 1	-	OK to use
>> Actual measured skill 2	-	OK to use
>> Etc	-	OK to use
- It is important that you select only from the sub skills which are identified with ">>". Selecting the top level skill area header will result in **no skill area showing** in the following section
- We encourage you to consider carefully the following points when establishing which areas in which to focus development activity:
 - ① Take time to review this persons skill profile - Identify strengths and weaknesses
 - ② View your previous departmental graphs and take time to understand how the **combined skills of your team** work to compliment & contradict your desire for effective skill cover
 - ③ Consider your company objectives. Effective skill development is dependant on the skills being taught having a positive influence on the performance of your organisation
 - ④ Take care not to **over commit** to providing more training opportunities than you can realistically support. This is often a mistake made with the best intentions, however also a one that can have a very negative influence

Employee name:

Q.1

Outline the training method / support proposed for the individuals development objectives selected in the previous section

During the actual on-line review, at this point your "**Development Needs**" selections made in the previous section Q.5, will automatically be shown - A minimum of one and maximum of five. This stage of the review is used to establish how you propose to support this training need and each development need must be allocated a method of delivering the education program.

For consideration:

- Each area of education / development can be supported in one of 3 basic ways:
 - ① External support via a training course or event
 - A selection here signifies the training will be sourced outside of the company
 - It also triggers the searching of our database to identify providers of this type of support
 - A random selection of local providers will be generated as pages 13 onwards
 - ② In house training from your own staff
 - We recommend this option is applied when your company has its own internal training resources and they are applicable to this choice of development need
 - ③ Support and teaching from myself or a colleague
 - In some cases you may feel a 'Mentor' type approach or some form of concentrated 1 to 1 assistance is in order
 - We suggest this element is used to **formally** capture that this **informal** method is your planned approach.
- We **strongly** recommend you take care here as you are creating expectations. Should you then fail to deliver these plans, this can have a very de-motivating impact on your team and your organisation.

Employee name:

Q.2

Review summary - Add your personal closing comments

This is your final opportunity to capture your overall perception of this person's:

- ① General performance - Include reference to attributes such as *Punctuality / Motivation / Attendance / Etc*
- ② Any specific subjects not yet covered that you feel it appropriate to capture
- ③ Overall effort and contribution

For consideration:

- It is very important that you maintain consistency within the review. To support this we promote that you use this section only to re-iterate the comments and views you have already made
- To maintain the continuity of the report you must start your comments with the text provided:

"As a summary to this review I would like to"

Failure to observe this will adversely affect the presentation of your finished report.

- The free text fields within the review are designed for you the reviewer to personalise your work. It is the comments in these sections that will individually differentiate the performance of your staff. A minimum of 25 words must be used, however we promote you make best use of the 300 word limit.

We strongly promote you include things like:

- a. The persons name
- b. Unique events

We also suggest you:

- a. Are never vague
- b. Apply praise where due
- c. Identify weakness
- d. Offer constructive advice

- **Vagueness will not make for a good report and will not get across a strong message - Whatever the performance!**

Please utilise the separate sheet (P.20) provided to formulate your free text:



Scoring Guidelines – Applicable to skills

The ratings applied must range between:

- 01 - The lowest rating you may apply
- 15 - The highest rating you may apply

Ratings of 0 and those above 15 will be rejected at the point you try to proceed via the **Next>>** tab.

1 - Very poor

Marking at this level denotes a severe lack of interest and aptitude on behalf of the employee. Anyone being scored in this region would have his or her effort and suitability for the role questioned

3 - Little to no exposure with no real self driven effort to develop

This level suggests the person has not been given dedicated time or focused assistance to support developing this area of competence. Nor has the individual made any visible efforts themselves to enhance their understanding, or experience in this skill sector

5 - Some usable skill with signs of self-motivated efforts to learn

A person obtaining scores in this region is starting to understand and apply the principles of this area of competence. They will openly show an interest in learning more and an aptitude that supports this

7 - Familiar with the concept, will benefit further from focused teaching

This rating shows a person who draws regularly on this area of skill, however requires guidance and further support to make more effective use. People in this band may still be unclear as to what benefits can be obtained from further enhancements of their skill

9 - Comfortable with day to day application of this skill

A person scored in this area is using / applying this skill consistently to good affect. Colleagues may start to recognise their above average performance in this specific area. They understand their limitations and can explain the benefits from further development. They can offer suggestions on how to increase their knowledge and can share ideas on how this could then be effectively applied within the business

11 - Highly skilled and self-motivated

Scoring here will indicate a strong grasp and effective application of the referred to skill. Colleagues will readily recognise the high level of expertise possessed by a person at this level and it is likely you will be aware of examples of how the team have utilised this to good effect. People receiving ratings at this level will also demonstrate a high level of self-motivation as they actively apply their knowledge. At this level opportunities to progress further may be limited. It is likely they will exist only if specific business needs arise

13 - Exceptional level of knowledge and able to teach to others

Ratings given in this area will apply to very experienced staff who demonstrate an exceptionally high level of skill in this area and can offer many examples of applying this within their role. Their level of skill is such that they are in a position to pass this to others, however they may not have had the need, or opportunity to do this yet

15 - Able to and involved in teaching to others

The merits required to attract this rating are very rare. Use cautiously as it carries the unwritten understanding that further improvement is not possible! Their superior skills in this field are well known and respected in the organisation. They are consistently applied within their role and the resultant benefits achieved are readily apparent. A person scored in this area will have demonstrated on many occasions their ability and willingness to effectively pass these skills to others



Scoring Guidelines – Applicable to personal attributes

The ratings applied must range between:

01 - The lowest rating you may apply

15 - The highest rating you may apply

Ratings of 0 and those above 15 will be rejected at the point you try to proceed via the **Next>>** tab

Please note that in providing our clients with the total flexibility to create their own unique skill-sets, our scoring guidelines may not apply to all bespoke attributes you may decide to add and measure. Provided below are our guidelines that apply to our system offered *Personal attributes*.

1 - Very poor

This level denotes a severe lack of interest on behalf of the employee. **OR** Reflects someone who does not demonstrate, nor wishes to achieve even the basic requirements needed to fulfil the role. Anyone being scored in this region could have his or her interest and, or suitability for the role questioned.

3 – Poor

Scoring in this region is likely to reflect someone who is aware of their *shortfalls* yet has made no visible efforts to enhance their *contribution*. An individual being marked in this area must improve their approach quickly. **OR** Change their approach towards the measured attribute by accepting the need for it and their role in moving forward.

5 – Below average

Marking around this level denotes a person who is aware of what is needed and is showing some limited signs of trying to address this. **OR** Is demonstrating a positive awareness of the attribute and how they display it, with an acceptance that enhancement is required.

7 - Average

This rating is *middle of the road*. Individuals attracting this type of mark tend to know what is required, do what is required and yet offer nothing out of the ordinary. Current business needs are such that you can accept their approach. **OR** It can signify an acceptable appliance of the attribute, one that fulfils the needs of the role.

9 – Above average

A person scored in this area knows what is required, consistently demonstrates that they meet the basic requirements and on occasion has gone that little bit further if the need has arisen. They will however have made quite clear the boundaries to where this extra effort will stop are not showing any signs of a desire to change this. **OR** Has a slightly higher than average ability to apply the attribute but may not fully utilise this on all occasions.

11 – Very good

Provides that little bit more than other well respected staff and on most occasions they can be relied on for the extra support required. There are limitations to what they can offer, however they recognise this and where practical they are prepared to work to overcome them. **OR** Has an ability, higher than most, to apply the attribute and does this quite frequently to good effect.

13 - Exceptional

If something out of the ordinary is required then this is likely to be one of those people you would turn to for assistance in this area. You are confident that individuals attracting this score will give 100% of what they can and they have very few limitations in the area you are considering. **OR** Uses their notably high facility to apply the attribute whenever they can. Their level of contribution through this attribute is readily apparent and well recognised in the organisation.

15 – Outstanding

The merits required to attract this rating are very rare. Use cautiously as it carries the unwritten understanding that further improvement is not possible! The persons contribution is first class, well recognised by those who work around them and you have never had question to doubt their 100% unrestricted contribution. **OR** Not only offers as required the significant benefits associated with this attribute, is depended upon for the effective operation of the department.