

Performance Overview & Goal Setting

Position	
Employee	
Address of Employment	
Meeting Date	
Line Manager	
Work Period	
Goal Setting Period	

Part A

A1

State your understanding of your role/responsibilities within this Job

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A2 Discussion Points

1. Has the past year been good/bad/satisfactory or otherwise for you, and why?
2. What do you consider to be your most important achievements this year in the role?
3. What do you like and dislike about working in this role?
4. What elements of your job do you find most difficult?
5. What elements of your job interest you the most, and least?
6. What do you consider to be your most important aims and tasks in the next year?
7. What action could be taken to improve your performance in your current position by you, and your employer?
8. What kind of work or job would you like to be doing in one/two/five year's time?
9. What (if any) training do you would you like to help assist in the fulfilment of your role – formal and informal?

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A3

Score your own capability or knowledge in the following areas in terms of your current role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent).

Topic	Score 1-10
Time Management	
Communication Skills	
Delegation Skills	
IT /Equipment/ Machinery	
Attention to detail	
Steadiness under pressure	
Meeting Deadlines	
Creativity	
Team Working	
Adaptability & Flexibility	
Energy, Determination and Work rate	
Marketing – Social Media	
Team Work and Ability to gel with others	
Professionalism towards clients/peers	

A4

List the objectives you set out to achieve in the period covered by this appraisal (with the measures or standards agreed) - against each comment on achievement or otherwise, with reasons where appropriate. Score the performance against each objective (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent)

Objective	Measure of Success	Score	Comment

A5

In light of your current capabilities, your performance against past objectives, and your future personal growth and/or job aspirations, what activities and tasks would you like to focus on during the next year. Again, also think of development and experiences outside of job skills - related to personal aims, fulfilment, passions.

No.	Description
1	
2	