

Name:

Year:

Department:

Manager:

### 1. Business Priorities

Record the discussion around what the priorities are for your part of the business this year here

### 2. Financial Targets/KPI's/Individual Objectives

Examples

Record the individual objectives/KPIs/Financials targets you are expected to achieve this year here  
(Aim for approx 6 objectives)

➔ How have you performed against your individual objectives/KPIs/Financial Targets?

### 5. Career Aspirations

Record what your career aspirations are in the short & long term here

### 6. Support Required

Record what support you require from your manager here?  
(Frequency of meeting, format of meetings, notes, etc)

### 4. Development

Record what development you need and how you are going to achieve it here

### 3. Team Behaviours

Attributes

Record what your strengths are and what attributes you need to develop here

How have you performed overall against agreed expectations?

➔ How have you performed against your development plan?

➔ How have you performed against the behaviours?

4

3

2

Colleagues

Performance Excellence

Click here for ratings

Looking forward

Looking back

Print

Date:

Date:

Date:

Date:

You and your team member discuss what their individual objectives are for the year ahead. They should be strategic and future focused. Focus on 6 really key strategic objectives the areas that are going to make the biggest difference in the coming year e.g.

- Gain x new clients in London by increasing conversion rates from 15% to 20% by December 2014
- Design & Implement a new performance management process across the organisation by the end of the year
- Grow market share 5% by developing links with the corporate division and a local marketing campaign with local business by June 2014
- Increase active membership by 100 new members by March 2014
- Increase self-pay revenue by 2% by June 2014 through attracting consultant from our competitors and a marketing campaign targeting cosmetics and bariatrics.

# Performance Ratings

Top Performer	<b>OUTSTANDING OVERALL</b> performance in all areas relative to peers, making a significant impact to Nuffield Health. Individual has gone way above what is required in everything they do.
Strong Performer	A <b>STRONG OVERALL</b> performance by an individual relative to peers who makes a valuable contribution to Nuffield Health. The individual has delivered everything that is required of them to a high standard, outperforming in some areas.
Good Performer	An overall performance by the individual which is <b>GOOD</b> relative to peers. They have done everything that is expected of them and made considerable efforts to achieve what is required.
Under/Inconsistent Performer	<b>UNACCEPTABLE</b> overall performance relative to peers, struggling to perform in current role and there are significant gaps in their ability to achieve satisfactory performance at this level. Performance can be inconsistent.

# The Nuffield Health way

## Team Behaviours

### I'm Enterprising

- I create new ways of inspiring and engaging customers & colleagues.
- I keep things simple and ensure I deliver all my duties on time and to the highest standards
- I demonstrate initiative - seeking opportunities to make improvements

### I'm Passionate

- I am a champion of Nuffield Health's vision, our role as a charity and our approach to wellbeing
- I relentlessly push myself to develop my skills, build my knowledge and improve my performance
- I consistently deliver great customer service

### I'm Independent

- I am self motivated and always positive.
- I always 'do the right thing' and put my customers first
- I communicate positively and confidently with all customers and colleagues

### I'm Caring

- I am respectful towards my customers and colleagues
- I build rapport with every customer, am responsive to their needs and treat everyone as an individual.
- I demonstrate empathy and always put myself in my customers' shoes.