

# Performance Excellence

## Sales

Name:

Location:

Manager:

Date:

### What's Expected of Me?

What's Expected of Me?	Exceeds	Meets Expectations	Developing	Below Expectations
Responsible for hitting daily targets for self-generated prospects				
Responsible for converting membership sales from: self-generated leads, walk-ins, web enquiries, targeted/planned outreach, local and National corporate sales opportunities				
Appropriate up selling at point of sale, (i.e. Wellbeing Membership, Personal Training)				
Responsible for selling the benefits of specialist health products based on what is right for the member				
Responsible for capturing member referrals and driving innovative member referral programmes				
Achievement of daily KPI's				

### Our Team Behaviours

Our Team Behaviours	Exceeds	Meets Expectations	Developing	Below Expectations
<b>E</b> <ul style="list-style-type: none"> <li>I create new ways of inspiring and engaging customers and colleagues</li> <li>I keep things simple and ensure I deliver all my duties on time and to the highest standards</li> <li>I demonstrate initiative - seeking opportunities to make improvements</li> </ul>				
<b>P</b> <ul style="list-style-type: none"> <li>I am a champion of Nuffield Health's vision, our role as a charity and our approach to wellbeing</li> <li>I relentlessly push myself to develop my skills, build my knowledge and improve my performance</li> <li>I consistently deliver great customer service</li> </ul>				
<b>I</b> <ul style="list-style-type: none"> <li>I am self motivated and always positive</li> <li>I always 'do the right thing' and put my customers first.</li> <li>I communicate positively and confidently with all customers and colleagues</li> </ul>				
<b>C</b> <ul style="list-style-type: none"> <li>I am respectful towards my customers and colleagues.</li> <li>I build rapport with every customer, am responsive to their needs and treat everyone as an individual</li> <li>I demonstrate empathy and always put myself in my customers' shoes</li> </ul>				

### Learning & Development Needs

Things I need to work on.  
 Things to do current job better.  
 Things to prepare me for next job.  
 Mandatory Training

### Focus Areas/Career Aspirations

Individual objectives or special projects.  
 Extra things in my job to help me get to where I want to get to.

### Final Year Assessment:

# Regular Check-ins

<b>My Comments</b>	<b>My Line Manager's Comments</b>
<b>First Review Date:</b>	<b>First Review Date:</b>
<b>Date:</b>	<b>Date:</b>
<b>Date:</b>	<b>Date:</b>
<b>Final Review Date:</b>	<b>Final Review Date:</b>