

QUARTERLY PERFORMANCE REVIEW

[INSERT COMPANY LOGO HERE]

(Company Name) Performance & Professional Development Review Form

EMPLOYEE INFORMATION		
Name:	Position:	Department:
Date commenced:	Date probation period ends (where applicable)	Date of Review:

CONFIDENTIAL

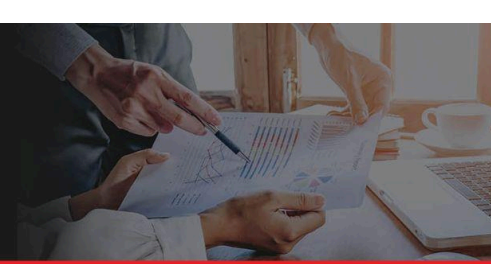
We believe in transparency and while we talk performance on an ongoing basis, our Annual Review provides an opportunity to provide some overall feedback as we take stock of the year.

The attached questions are provided to help you and us obtain maximum benefit from this Review and to minimise time required to complete. **We envisage it should take no more than 30 minutes to answer these questions which will be followed by a 1 on 1 with your Direct Manager.**

A section of the form has a rating system. This is designed to be focused around your development opportunities. Please consider this when completing. As a guide, the below definitions can be applied.

5 Level Rating Scale	Descriptors	Descriptions
5	Exceptional	Behaviour and Performance consistently exceeds standards
4	Above Expectations	Behaviour and Performance is fully satisfactory and often exceeds standards
3	Successful	Behaviour and Performance is fully satisfactory and meets standards
2	Development Needed	Behaviour and Performance standards are not fully achieved.
1	Poor	Behaviour and Performance standards are poor.

QUARTERLY PERFORMANCE REVIEW



Wins and Achievements

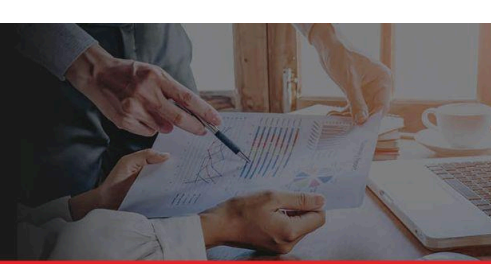
List off your biggest wins and achievements for the past 90 days:

Role

Please rate yourself on the following scale for your key roles:

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QUARTERLY PERFORMANCE REVIEW



Please circle the appropriate rating below: (see examples below)

Treating patients

- Exceptional
- Above Expectations
- Successful
- Development needed
- Poor

Why did you give this rating?

Retention of patients

- Exceptional
- Above Expectations
- Successful
- Development needed
- Poor

Why did you give this rating?

Clinical notes

- Exceptional
- Above Expectations
- Successful
- Development needed
- Poor

Why did you give this rating?

QUARTERLY PERFORMANCE REVIEW



Social media posts

- Exceptional
- Above Expectations
- Successful
- Development needed
- Poor

Why did you give this rating?

Skillset

How does your skillset need to improve in the next 90 days?

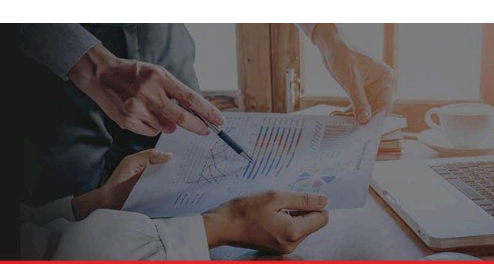
What PD did you complete this last quarter to improve your skillset?

How does your skillset need to improve/evolve to lift to an entirely new level for the next quarter?

What are your learning goals for the next quarter?

If you could do this, what difference would this make to you?

QUARTERLY PERFORMANCE REVIEW



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EVALUATION	Rating: 1 2 3 4 5	Assessor
Personal Productivity / Time Management		
Quality of work / Attention to detail		
Customer Service		
Ability to work effectively with team		
Takes initiative, helps others where possible		
Takes feedback		
Takes ownership - Does what they say they will do		
Compliance with Company Processes and Systems		
Passionate about what we do and lives and leads our Values		

Core values rating:

[ASSESSOR TO COMPLETE]

QUARTERLY PERFORMANCE REVIEW

We are extremely passionate about team, environment and culture and these Value Success Factors define the foundations of how we operate and people who will be successful in our team. While we also set sales, financial and productivity targets that are important – however our ultimate success is determined by our Values and how we do business. If we do business in this way – all of our success will follow.

The assessor will rate on the following:

+ Green – Upholds core value

- Yellow – Sometimes upholds the value but can become a + if they want to and can uphold the value(s).

X Red – Doesn't uphold the value all the time

Core Values	Green(+)	Yellow (-)	Red (x)
(insert core value here)			
(insert core value here)			
(insert core value here)			
(insert core value here)			
(insert core value here)			
(insert core value here)			
(insert core value here)			
(insert core value here)			

Behaviour:

What are the undesirable behaviours that you need to leave behind at the old level?

Attitude:

How do you feel like your attitude fits in to what we expect in our organisation?

What are you most excited about for the next 90 days?

Suggested areas for improvement from the assessor: [ASSESSOR TO COMPLETE]

QUARTERLY PERFORMANCE REVIEW



ACTIONS FOR THE NEXT 90 DAYS	Date

Employee Signature: _____

Date: _____

Manager Signature: _____

Date: _____