

# Creighton Fund

## Performance Review

<b>NAME:</b>	<b>TITLE:</b>	
<b>EVALUATOR'S NAME:</b>		
<b>SUPERVISOR'S NAME:</b>		
<b>TYPE OF REVIEW:</b>		
<input type="checkbox"/> 5 <sup>th</sup> Shift		
<b>PERIOD COVERED BY THIS APPRAISAL:</b>	<b>FROM:</b>	<b>TO:</b>

- Explain the purpose for the review
- Answer questions the employee has before starting
- Make sure the employee feels free to ask questions at any time
- Ask the following questions of the employee:

1. How do YOU feel about your performance so far?

2. What do YOU think you could work on?

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- Review stats sheet (copy for caller with explanation of what each category means) and individual stats
  - Review call monitoring (copy of blank form for caller), biweekly evaluations and individual monitoring summary
  - Review performance appraisal (copy of blank form for caller) and individual appraisal results
  - Discuss action plan, record comments, and give copy to employee
  - Any other questions, comments to share?
  - Thanks for coming; we will pay you for \_\_\_\_\_ on your next timesheet.

**KEY PERFORMANCE FACTORS:** Review the employee's performance in each area provided and note where the employee excels and where improvement is necessary.

**RATING SCALE:**

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>UNSATISFACTORY PERFORMANCE</b> Does not meet the minimum requirements of the job.	<b>MARGINAL PERFORMANCE</b> Sometimes acceptable, but not consistent	<b>MEETS EXPECTATIONS</b> Consistently meets the requirements of the job in all aspects.	<b>EXCEEDS EXPECTATIONS</b> Clearly and consistently above what is required.	<b>EXCEPTIONAL PERFORMANCE</b> Unique and exceptional accomplishments.

KEY PERFORMANCE FACTORS	COMMENTS	RATING
<b>JOB PERFORMANCE:</b> <ul style="list-style-type: none"> <li>• Follows guidelines for appropriate calling behavior (scripts, objection responses, etc.)</li> <li>• Achieves satisfactory calling stats</li> </ul>		
<b>COMMUNICATION:</b> <ul style="list-style-type: none"> <li>• Listens effectively</li> <li>• Responds clearly and appropriately</li> <li>• Informs supervisor and affected personnel of necessary information</li> </ul>		
<b>INTERACTION WITH OTHERS:</b> <ul style="list-style-type: none"> <li>• Works cooperatively with ALL affected personnel</li> <li>• Focuses on performance rather than personality in relating to others</li> </ul>		
<b>RESPONSIBILITY AND PLANNING:</b> <ul style="list-style-type: none"> <li>• Attends work/meetings when scheduled</li> <li>• Is on time for work/meetings</li> <li>• Uses work time wisely and effectively</li> </ul>		
<b>ATTITUDE:</b> <ul style="list-style-type: none"> <li>• Desires to excel on the job</li> <li>• Demonstrates self-confidence and positive attitude towards self and others</li> <li>• Maintains high energy level</li> </ul>		
<b>WORK QUALITY:</b> <ul style="list-style-type: none"> <li>• Demonstrates accuracy, thoroughness, and reliability</li> <li>• Follows assigned work procedures</li> </ul>		
<b>PERFORMANCE SUMMARY</b>		<b>OVERALL RATING</b>

**PAST PERFORMANCE PLAN EVALUATION:** List prior period performance plan aspects and the extent to which the employee has accomplished them.

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**PERFORMANCE PLAN:** Identify specific actions/behaviors the employee needs to either start doing, stop doing, and/or continue in the upcoming performance period.

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**ADDITIONAL COMMENTS:**

Employee \_\_\_\_\_ Date \_\_\_\_\_  
(Your signature does not necessarily signify your agreement with the appraisal; it simply means that the appraisal has been discussed with you).

Appraiser \_\_\_\_\_ Date \_\_\_\_\_

Supervisor \_\_\_\_\_ Date \_\_\_\_\_