



HIRING & EMPOWERING
— SOLUTIONS —

THE EMPLOYEE GROWTH PLAN

**A SYSTEM TO KEEP YOUR TEAM
PRODUCTIVE AND ON A PLAN OF GROWTH!**

Employers typically dread conducting annual and periodic reviews, especially for any team not giving them problems. They fear they won't have anything to "review" the good employee on. But those are the people who need dedicated, focused time and attention the most. You want to keep all team members productive, feeling appreciated and growing. Thriving teams are made up of managers who provide consistent feedback on what's working, what's not working and what opportunities are available in your company's future. Employees are hungry for feedback and want you to share your vision and expectations of what you want from them in the future. It's an opportunity for them to share what they see available as well, from their perspective. Make sure as the team leader you schedule reviews quarterly for everyone the good and the bad – and for yourself!

Here is a system for conducting a review. This system should be provided to the team member two weeks in advance to complete prior to the review meeting. After they complete their self-evaluation, the direct manager, leader and/or boss should complete their part of the worksheet prior to the face-to-face review meeting. That meeting is to go over each person's review and get agreement on what the goals are to aim for before the next review. Have any homework, suggestions, etc. agreed to prior to the meeting.

EMPLOYEE GROWTH PLAN

EXAMPLE

TEAM MEMBER NAME: Mary Sample	TODAY'S DATE: August 5, 2018
EVALUATOR NAME: John	DATE OF LAST EVALUATION: April 5, 2018
	NEXT SCHEDULED EVALUATION:

REASON FOR EVALUATION:

☐ Annual ☐ 90-Day Evaluation ☐ Promotion ☐ Unsatisfactory Performance ☐ Other

TEAM MEMBER'S ACCOMPLISHMENTS SINCE LAST REVIEW

Took ownership of workshops from setup to hosting without the boss's involvement.
Completed basic office training, phone procedures, etc.
Attended annual paralegal conference with team.

MANAGER COMMENTS ON WHAT NEEDS IMPROVEMENT

WHAT'S WORKING

1. Not afraid to jump in and try new things
2. Wants to make a difference - be part of something worthwhile
3. Not afraid to call clients and talk to them at workshops - doesn't "hide"

WHAT NEEDS IMPROVEMENT

1. Slow in turnaround, needs to prioritize better
2. Existing Workshop Preparation Checklist hasn't been used all the time for accuracy
3. Poor communication skills and grammar, talks in slang

RECOMMENDED TOOLS TO SUPPORT IMPROVEMENT

1. Use Top Three Gottas™ to prioritize weekly results.
2. Use existing systems and checklists – don't re-create.
3. Read basic grammar book. Have assigned team member proof written work for learning and improvement.

NAME: _____ DATE: _____

**PLEASE RATE YOURSELF FOR EACH OF THE FOLLOWING
AREAS IN REGARDS TO YOUR WORK PERFORMANCE.**

S – Superior. Performance is exceptional in all areas and is recognizable as being far superior to others.

A – Average. Competent and dependable level of performance. Meets performance standards of the job.

I – Improvement needed. Performance is lacking in certain areas. Improvement is necessary.

AVAILABILITY:

The degree to which employee is prompt, follows employee guidelines and has an acceptable overall attendance record.

EMPLOYEE RATING

S A I

EMPLOYER RATING

S A I

ATTITUDE:

The stability, politeness, and judgment shown on the job.

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CREATIVITY:

The degree to which employee suggests ideas and uncovers new and improved ways of doing things.

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The extent to which employee's work is accurate, thorough and neat. Completes work in a timely manner.

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ORGANIZATION:

The extent to which employee maintains organization in the office, with projects, and at their desk.

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TIME MANAGEMENT/PRIORITIZATION:

The extent to which employee prioritizes projects and manages their time accordingly.

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CLIENT/CUSTOMER SERVICE:

The extent to which employee assists clients over the telephone and in person by speaking in a professional, friendly manner, as well as making sure the client is taken care of above and beyond and feels appreciated.

S A I S A I

TEAM WORK:

The willingness and ability to communicate, cooperate and work with co-workers, supervisors and clients.

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*****PLEASE ANSWER THE FOLLOWING QUESTIONS.****1. IF WE WERE SITTING HERE ONE YEAR FROM TODAY IN YOUR EMPLOYEE REVIEW, WHAT WOULD HAVE TO HAVE HAPPENED, BOTH PERSONALLY AND PROFESSIONALLY, FOR YOU TO BE HAPPY WITH YOUR PROGRESS?**

I would be hosting all office workshops and take the lead on creation and marketing of workshops. Personally I would have purchased my first home.

2. WHAT ARE THE THREE MOST IMPACTFUL WAYS YOU CONTRIBUTE TO THE TEAM?

1. I provide phone backup so other team members aren't interrupted while working on timely projects.
2. I host workshops and prepare the training room to help impress potential clients.
3. I provide support for other team members, such as scanning and word processing, so they can focus on

3. WHAT ARE THREE NEW IMPACTFUL WAYS YOU CAN CONTRIBUTE TO THE TEAM?

1. I can host all workshops to free up team's time.
2. I can assist in marketing workshops to increase attendance and potential clients.
3. I can learn to do after-workshop follow-up calls to help convert prospects faster.

4. IF YOU COULD CHANGE ONE THING ABOUT YOUR JOB, WHAT WOULD IT BE AND HOW WOULD YOU CHANGE IT?

I could contact more potential clients in the early evening, after they arrive home from work. I would like to change my hours to 9:30-6:30 for a 90-day trial basis and track the results of meetings booked.

5. WHAT CAN I DO TO SUPPORT YOU IN YOUR ROLE?

Allow the 90-day trial basis hour adjustment with tracking and reporting presented to you after the 90 days. If I increase conversion rates by 15% I will receive a \$250 bonus and the change in hours becomes permanent.

6. IF THERE WAS ONE THING YOU COULD SUGGEST TO IMPROVE OUR COMPANY, WHAT WOULD IT BE?

Provide clear, measurable goals for what a new employee should accomplish within 60 days and the bonus structure that will be presented.

7. WHAT ARE THREE THINGS YOU CAN THINK OF TO HELP IMPROVE YOUR PRODUCTION?

1. Change in hours
2. Update graphic design program to InDesign
3. Approve 4 hours of training for me on how to effectively handle client follow-up

WHAT WOULD IT TAKE TO PUT EACH OF THOSE IN PLACE?

1. Your written agreement by this Friday
2. Find the purchase order for the \$499 purchase to be placed tomorrow
3. Allow me to schedule and train with Suzie within the next 5 business days

8. IF THERE WERE ONE POSITION WITHIN THIS COMPANY THAT MADE YOU EXCITED TO COME HERE EVERY DAY, WHAT WOULD IT BE?

I would be excited to teach workshops and meet with potential clients. I like to talk to people and explain our services. I would like to schedule a meeting to discuss this position to use this skill of talking/explanation/sales more and handle less preparation/paperwork. I see this role as a Client Relations Director

10. WHAT CAN WE DO TO SUPPORT YOU WITH THAT OVER THE NEXT YEAR?

Allow me to begin to handle prospect and client follow-up and hone my sales skills as I better learn our services. When appropriate, allow me to co-teach parts of workshops and begin to cross-train Sheri on how to take over my office manager duties, which can be done in 8 hours a week while she continues to serve as a receptionist. Therefore no additional overhead/hiring is necessary.

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11. WHAT ELSE WOULD YOU LIKE TO SHARE AT THIS TIME?

TEAM MEMBER’S SIGNATURE _____

EVALUATOR’S SIGNATURE _____

Follow Up Evaluation Requested? Yes No

Follow up date ____ / ____ / ____