

Form – Service Engagement Coordinator – Performance Review Template

Step 1: Plan – Reviews to be completed by the end of the first week of October Yearly

1. Plan the review by according to your business goals for the year ahead. Think about how the employee’s work performance will help your business reach these goals. You should consider:
 - what tasks the job involves
 - what skills and abilities are needed to do the job?
 - what level of performance is expected?
2. Book a Review meeting with each employee
3. Email each employee a copy of their position description, and Performance Review for return (with employee comments) before the meeting.

Step 2: Review

1. Meet with each employee every 12 months to assess their performance against the agreed goals.
2. During the meeting, talk with the employee about:
 - how they have been performing
 - the skills they need to develop
 - their own ideas about learning and development opportunities
 - for casual staff - provide a copy of the Fairwork casual statement
www.fairwork.gov.au/sites/default/files/migration/724/casual-employment-information-statement.pdf
3. Document any actions required in the comments section with a follow up date.
4. Consider whether you need to revise their performance goals or set new ones for the next cycle.

Good practice four-point rating scale - To be used by Manger for evaluating performance goals

Use this 1-4 rating scale to rate each criteria with comments in the review document.

Four-point rating scale	Definition
1. Does not meet expectations	The employee consistently fails to meet agreed expectations
2. Meets most expectations	The employee meets most agreed expectations
3. Meets all expectations	The employee meets all agreed expectations
4. Exceeds expectations	The employee always meets and sometimes exceeds agreed expectations

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Performance Review and Development Plan

Employee Details			
Employee name:		Position:	
Commencement date:		Department:	
Performance Period			
Annual Review Date:			

Acknowledgement of Review *To be signed off by Employee and Manager after review*

Agreement – Planning & Annual Review					
Employee Name:		Signature		Date:	
Manager Name:		Signature		Date:	

Employee Survey	
Have you reviewed your position description? Please circle and add any comments	Yes/No
Do you have any feedback on the Headway communications (e.g., newsletter, website, internal communications)?	
Are there any areas of training you would like to see across Headway (e.g., staff meetings, training days)?	

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Performance goals *Employee to enter comments, then Manager to enter a rating and comment*

Task / Responsibility	Required outcomes	Annual Review Progress Employee Comments	Annual Review Progress Manager Comments	Rating scale 1-4
Client Contact	1.Manage all reception duties in an effective and efficient manner. 2.Provide an efficient, welcoming point of contact for actual and potential clients, carers and related parties 3.Effectively manage face to face and telephone client contact and relay accurate content to our CRM system and client files 4.Perform initial assessments of clients as appropriate and assess the urgency of their query. 5.Coordinate thorough, timely and accurate management of client data in our CRM 6.Prioritise tasks appropriately to ensure optimised customer service.			
General Administration	1. Undertake a wide range of general administration tasks 2.Ensure accurate, thorough and clear records and details are entered and maintained.			

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	<p>3. Effective administration of CRM management for all client related data/enquiries, as well as any other associated software or systems related to our client data as appropriate</p> <p>4. Produce training and instructions in relation to intake processes in collaboration with internal stakeholders</p> <p>5. Complete reporting relating to CRM, client processes and client data for management as required</p>			
Confidentiality and Data Management	<p>1. Demonstrate awareness and understanding of administrative standards as well as applicable policies and procedures including references to the NDIS, confidentiality and client rights</p> <p>2. Ensure accuracy and timely input of client data into CRM programs.</p>			
Conduct (Policies, Procedures, Improvement)	<p>1. Assist in the development of our Client Services procedures to model and document best practice customer experiences and data management</p> <p>2. Ensure adherence to Headway policies and procedures with an emphasis on modelling the organisation's values</p>			

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	<p>and contributing to a positive working environment.</p> <p>3. Demonstrate a proactive approach to OHS, ensuring identified risks are communicated to management and addressed in a timely manner.</p> <p>4. Demonstrate a focus on improvement and to the commitments of the administration team and overall organisation.</p>			
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Learning / Development / Training Plan Areas to be marked N/A if not required.

Areas for learning/development <i>skills and behaviors the employee could improve</i>	Actions <i>List agreed strategies to achieve the learning/development</i>	Annual Review Progress Employee Comments	Annual Review Progress Manager Comments
Areas for training <i>skills and behaviors the employee could have formal training in</i>	Actions <i>List agreed strategies to achieve the development</i>	Annual Review Progress Employee Comments	Annual Review Progress Manager Comments

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Overall comments	
Employee overall comments:	
Manager overall comments:	

Review discussion notes	Date Due
Any other discussion points to be recorded or followed up:	