

## **Performance Appraisal for Business Staff**

At the completion of a successful 60-to-90-day training period, a performance appraisal should be given. Appraisals should be given at least annually thereafter, separated from a discussion of a salary increase by at least one month. If a raise and performance appraisal are discussed simultaneously, staff members are more attuned to news of increased wages than to understanding and committing to needed improvements in work skills and habits. An appraisal for a business auxiliary follows.

## Performance Appraisal for Business Staff

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Position/role: \_\_\_\_\_ Date Hired: \_\_\_\_\_

### Instruction to the Appraiser

1. Consider only one trait or quality at a time. Do not let your judgment concerning one trait influence your judgment of other traits.
2. Consider the individual's entire work performance. Do not base your judgment on only one or two recent occurrences.
3. Please check only one box on each line. Include specific examples to illustrate comments.

<b>1. Results (output)</b>	Well above standards; excellent overall results.  <input type="radio"/>	Better than others usually; rarely falls below standards.  <input type="radio"/>	Average; turns out required amount of work but seldom more.  <input type="radio"/>	Generally, all right; but sometimes below standards.  <input type="radio"/>	Frequently below standards, needs sharp improvement.  <input type="radio"/>
<b>2. Planning and organization</b>	Real talent for organizing. Handles any job systematically.  <input type="radio"/>	More than satisfies job requirements. Plans in order to use time effectively.  <input type="radio"/>	Works in an orderly way occasionally.  <input type="radio"/>	Does routine tasks but does not plan other work efficiently.  <input type="radio"/>	Very disorderly. Does not follow routine work methods well.  <input type="radio"/>
<b>3. Mental alertness (adaptability)</b>	Outstanding in all respects.  <input type="radio"/>	Quicker than most in learning new ways.  <input type="radio"/>	Handles non-detailed instructions fairly well.  <input type="radio"/>	Not especially alert. Slow in grasping new instructions.  <input type="radio"/>	Limited to routine job. Learns slowly; confused by complexity.  <input type="radio"/>
<b>4. Dependability</b>	Extraordinarily dependable in all aspects. Attendance superior. Never late.  <input type="radio"/>	Does assigned jobs with a high degree of reliability. Rarely absent.  <input type="radio"/>	Can be depended on to do a good day's work. Minimal absenteeism  <input type="radio"/>	Not fully dependable. Absent too frequently.  <input type="radio"/>	Too unreliable to keep job without improvement. Excessive absenteeism.  <input type="radio"/>
<b>5. Initiative; amount of supervision required</b>	Resourceful. Develops assignments without follow-up instructions.  <input type="radio"/>	Fairly self-sufficient. Requires little follow-up.  <input type="radio"/>	Needs occasional follow-up. Does assignments without much direction.  <input type="radio"/>	Requires frequent follow-up. Wants to be shown and told.  <input type="radio"/>	Needs follow-up on all phases of work assignments.  <input type="radio"/>
<b>6. Ability to get along with others; cooperation and attitude</b>	Exceptional. Good team player. Always cooperative.  <input type="radio"/>	Cooperative. Usually goes more than halfway.  <input type="radio"/>	Usually, cooperative. May clash with others occasionally.  <input type="radio"/>	Cooperative only when he/she has to be. Frequent complaints from co-workers.  <input type="radio"/>	Too poor to keep on job without improvement.  <input type="radio"/>

**Illustrate each of the following evaluations with specific examples. Use a separate sheet for notes if needed.**

	Excellent	Satisfactory	Needs Improvement
On time for work			
General appearance			
Voice			
Enthusiasm			
Sincerity			
Mannerisms around office			
Telephone techniques			
Vocabulary and grammar			
Ability to spot and eliminate problem areas			
Efficiency and proficiency with duties			
Looks for things to do			
Private life interfering with work			
Telephone use during work hours			

What do you as an employee feel should be changed (begun, stopped, or improved) about your work environment or the practice as a whole?

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**Appraiser's comments:**

Steps recommended for further employee development (i.e., additional training, growth of skills, change of attitude, initiative, etc.)

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**Auxiliary's reaction and commitment:**

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Auxiliary's signature

Date

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Appraiser's signature

Date