# IPW, INC.

### Job Performance Review Guide

| CLIENT | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Client Name | |  | | Review Period | | |  |
| Case Number |  | | | Case Manager | |  | |
| Performance goals and objectives | | | | | | | |
| Zero to 3 months | | | 3 to 6 months | | 6-9 months | | |
| * Become familiar with your department’s business goals. * Work with your manager to define and document your goals. Include what you are expected to produce by your first review, activities needed to accomplish results, and success criteria. | | | * Make certain defined goals and criteria are realistic. Renegotiate if necessary. * Are you focusing your time on the goals you committed to? If not, either work with your manager to change your goals or reevaluate how you spend your time. | | * Review performance goals to see if you are on target. Reprioritize work accordingly. | | |
| Notes/Actions | |  | | | | | |
| Skills and knowledge development | | | | | | | |
| Zero to 3 months | | | 2 to 6 months | | 6-9 months | | |
| * Understand the specific skills and knowledge you need. Use the job profile as your guide. * Build a skill development plan based on the goals agreed to by you and your manager. * Complete the new administrator orientation. | | | * Attend one of the sessions in the Administrator certification program. See the training resource site for courses. * Review your development plan and suggested curriculum for additional skills and training. | | * Attend at least one more session in the Administrator certification program. * Create a timeline with associated tasks that you will follow in order to attain the skills outlined in your personal development plan. | | |
| Notes/Actions | |  | | | | | |
| Processes and Methods | | | | | | | |
| Zero to 3 months | | | 3 to 6 months | | 6-9 months | | |
| * Familiarize yourself with work processes and methods used in your job. Be clear on who owns those processes and how you can support process goals. * Set clear timelines for task due dates. Keep timelines up to date. | | | * Identify and eliminate unnecessary variation in the way you perform work processes. * Ensure that your work responsibilities are clear, defined, and realistic. | | * Get to know the people who work cross-functionality in common work processes. * Seek to simplify any work processes in order to cut cycle time. | | |
| Notes/Actions | |  | | | | | |
| Feedback | | | | | | | |
| Zero to 3 months | | | 3 to 6 months | | 6-9 months | | |
| * Understand the different types of feedback and the ways in which you will receive feedback. | | | * Are you getting the feedback you need? Is feedback timely, specific, and frequent? * Compare actual performance and expected performance. | | * Are you giving feedback to others who need it? * Compare actual and expected performance. | | |
| Notes/Actions | |  | | | | | |