

EVALUATION RECORD CONFIDENTIAL

Employee: _____ ID #: _____

Date of Hire: _____

Initial Position: _____

Subsequent Positions: _____ Date: _____

_____ Date: _____

_____ Date: _____

Training: _____

Experience:

Languages: _____

Other Skills & Qualifications:

NOTES

Date: _____

Notes:

Date: _____

Notes:

Date: _____

Notes:

Date: _____

Notes:

Date: _____

Notes:

Date: _____

Notes:

PRE - PROBATIONARY REVIEW

Date of Review: _____

- ☐ Has positive 'Weekly Check-Up's' record
- ☐ Can handle all tasks related to the position and works at the required pace
- ☐ Gets along well with others; is respectful of all customers, peers and management
- ☐ Is a dynamic, enthusiastic, productive employee who contributes to the success of our team
- ☐ Shows initiative at all times
- ☐ Is always well groomed
- ☐ Has a good attendance record

Probationary period ends on: _____

Discussion Notes:

MONTHLY PERFORMANCE ANALYSIS

| Month | KPI's (Met or Exceeded Target) | | | | | | Level of Performance in Standards of Behavior | | |
|-------|-----------------------------------|-----|----------|-----|----|--|--|------|--------|
| | Sales | SPH | \$/Trans | UPT | WC | | Excel. | Fair | Unsat. |
| | | | | | | | | | |

Areas requiring improvement:

Training Needs:

Things to know for the month ahead:

Advancement:

Employee

Management

Date

QUARTERLY REVIEW

Fiscal Quarter 1 2 3 4

(Circle One)

Months of _____, _____, _____

| KPI | Actual | Target | % |
|-------------------|--------|--------|---|
| Sales | | | |
| Sales/Hour | | | |
| \$/Transaction | | | |
| Units/Transaction | | | |
| Wage Cost | | | |
| * | | | |

Ready for Advancement? Y N

If No, what does the employee have to do to be ready for advancement by the next quarterly review?

If Yes, what position(s) will the employee be considered for when it becomes available?

Employee

Management

Date

ANNUAL APPRAISAL

Anniversary date: _____

Over-all Results (Circle appropriate rating)

KPI's: E F U

Standards of Behavior: E F U

Outstanding Achievements:

Improvements Required:

Challenges:

- 1) _____
- 2) _____
- 3) _____

| | | |
|--------------------------|----------------------------|----------------------|
| _____ Employee | _____ Management | _____ Date |
|--------------------------|----------------------------|----------------------|

EMPLOYEE SELF ASSESSMENT

Name: _____

Over-all Results: (Circle appropriate rating)

KPI's: E F U

Standards of Behavior: E F U

My contribution to the success of the store/organization:

Skills I have developed during the past year:

Goals for the year ahead:

Employee

Date

EXECUTIVE REVIEW

The contents of this Evaluation Record were reviewed by other management individuals as follows:

[illegible]