



EMPLOYEE EVALUATION WORKSHEET

Employee Name: John Doe

Position: Production Supervisor

Date of Evaluation: 7/1/2011

FINANCIAL

Project Budget Adherence

# assigned	40	# within budget	38	Percentage: (within / assigned)	95
# months within budget	12				

Compensation Level

current pay:	40,000	standard pay:	39,500	Variance: (current / standard)	1.01
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CUSTOMER

Internal Customer Relationships

# positive survey responses	25	complaints received	11	Result: (complaints/responses)	0.44
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External Customer Relationships

# positive survey responses	200	complaints received	20	Result: (complaints/responses)	0.10
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INTERNAL PROCESSES

Tasks Completed On Schedule

# projects assigned	40	# completed by deadline	38	% completed on time (completed/assigned)	95%
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Task Success Rate

# tasks completed or days worked	260 days	# tasks or days without failure*	254 days	Success rate: (tasks without failure / tasks completed)	98%
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Resource efficiency

Planned resources	85,000 parts	Actual resources	86,241	Efficiency (used / allocated)	1.0146
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*Failure defined according to company policy or strategy



Employees Appraisal Form by BSC Designer

LEARNING AND GROWTH

# training opportunities participated in:	7
Number of improvement suggestions made:	14

ANALYSIS

	Result	Target Values*			Base Result	Weight**	Adjusted Points (Base x Weight)
		Poor / Red	Slow / Yellow	Success / Green	Poor = -1 Slow = 0 Success = 1		
Financial							
Projects w/in budget	95	< 85	85-94	>95	1	1.5	1.5
Months w/in budget	12	< 11	11	12	1	1.5	1.5
Compensation level	1.01	< 0.9	0.9-1.0	>1.0	1	1	1
Customer							
Internal success	.44	> 0.32	0.08 - 0.32	< 0.08	-1	1	-1
External success	.10	< 0.065	0.065-0.075	>.075	1	0.8	0.8
Internal Processes							
Tasks on-time	95	< 85	85-94	> 95	1	2	2
Success rate	98	< 85	85-94	> 95	1	2	2
Resource efficiency	1.0146	> 1.05	1.02 – 1.05	< 1.02	1	2	2
Learning & Growth							
Training participation	7	< 6	6 – 10	> 10	0	1	0
Suggestions offered	14	< 6	6 – 10	> 10	1	2	2
						Total Score	11.8
						Target Value*	14.8

*Target values determined by policy/strategy.

**Weights assigned according to policy/strategy. Weight of 1 = base result, greater than 1 adds weight and less than 1 decreases weight.

NOTES

As production manager, John's focus should be on keeping production on schedule and on budget, which he does well. However, John needs to improve his relationship with other team members to improve his Customer perspective. He also needs to participate in monthly training sessions more regularly. These two improvements will place him at the target value for this position.