

Monthly One to One Form

Staff Member	Joe Bloggs		
Manager	Jane Doe		
Date	01/01/2017	Period Under Review	December 2017

What has gone well this month?

I have improved my productivity percentage and it has positively affected my number of daily tasks which is great, I had my highest number of tasks completed in December.

I've enjoyed getting some coaching from my Deputy Manager to help with performance and accuracy.

What do you feel needs development?

Some of my targets were high and I failed to hit them, and I failed an audit which impacted my bonus.

Performance against last months objectives: What have you ACHIEVED? and HOW? What have you NOT ACHIEVED and WHY?

Goal	Outcome	Comments
Improve productivity from 75-85%	Achieved	I managed this by planning my day using the sheets provided to me by my manager.
Complete 25% more tasks this month	Achieved	I think my productivity improvements allowed me more time to complete tasks.
Achieve only TRFT or 24HRFT this month for any cases checked	Did Not Achieve	I failed an audit because of a file checking error.

Performance against key KPIs

KPI	Target	Actual	Divergence	What have you ACHIEVED? and HOW? What have you NOT ACHIEVED and WHY?
Productivity	85%	86%	+1%	I think the tasks set me by my trainer helped.
Compliance	85%	72%	-13%	I Had a case review where I didn't check docs properly that were not uploaded to the case...it was a silly error and I am using the new checklist now.
Tasks	7 P.D	8 P.D Average	+1	The productivity boost affected this stat.
Feefo	4.5 Star Average	4.9	+0.5	I'm always sending out Feefo review links to every client.

Staff Member Comments

Like I said I think I've done well on some stats but need help with others.



You've done fantastically this month to improve your availability and it's reflected in your compliance score improving as well as your tasking abilities which is great.

You've also made great progress completing your regulatory training modules which you'd forgotten about!

I agree that you are off the pace with your TRFT and we need to work on that.

I'd like to see what we can do to improve your numbers so that next month we're looking at all green stats!

This month's objectives

Goal	Action(s)	Deadline	Support	Deliverable
Improve Compliance Score to minimum acceptable (85%)	During slow periods I will assign someone to case check your apps with you. I would like you to send me 10 things you've learned that you will put into place on apps going forward by mid-month.	15/02	I will sit you with an experienced advisor when case checking	Improve number on numbers of TRFT and 24RFT from last month
	Id like you to confirm to me before each app submission that you have completed the new case checking form you have been provided by brining me the document to check.			
Maintain the new Tasking target of 8 per day	Continue the actions set you in the last 121, I will observe and feed back throughout the month to support.	EOM	N/A	Maintain Productivity of 86% and Tasks P.D of 8

Signed Staff Member		Signed Team Manager		Date	
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