

PERFORMANCE APPRAISAL

Scale-up Leaders' Academy 2026

Performance Appraisal

By Kinnery

Employee name		Dept/office		Return to Appraiser by	
Appraiser's name		Date/time of review		Date of Last Review	
Job title/role		Length of service		Time in Current Role	

To deliver a consistent minimum monthly billable revenue of £XXX,XXX and provide AA with enough oven ready clients to achieve that level. And to set up a process to land new accounts, and a process to maintain and increase client individual average monthly revenues.

(Straight from the Job Description)

Past Performance

(1-3 poor, 4-6 satisfactory, 7-9 good, 10 excellent)

List the performance and/or objectives that were set out to be achieved during the period since the last review. Comment on whether these were achieved or otherwise, with reasons where appropriate. Score the performance against each objective.

No.	Objective	Score	Comments
1	Grow revenue to £xxx,xxx by DATE. £xxx,xxx by DATE +1 and £xxx,xxx by DATE+2 <i>(Straight from the Job Description / mission)</i>		
2	Acquire X new clients by DATE. <i>(Straight from the Job Description/ mission)</i>		
3	Create and maintain a visible pipeline of oven ready clients, the size of which is to be determined.		
4	Ensure optimized visibility and reputation through the following Social Media: Blogs, social media followers, Website visits (Metrics to be decided)		
5	Develop, coordinate and deliver an appropriate marketing plan to consistently deliver these outcomes through a combination of :- Sales presentations; Seminar participants; Speaking engagements; Other?? By DATE		
6	Evidence the ability to make sales unaided By DATE		
Total score:			Note: the possible maximum score based on 10x number of key objectives listed

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Future Goals and Performance Targets

List the objectives and / or targets for the next period of review.

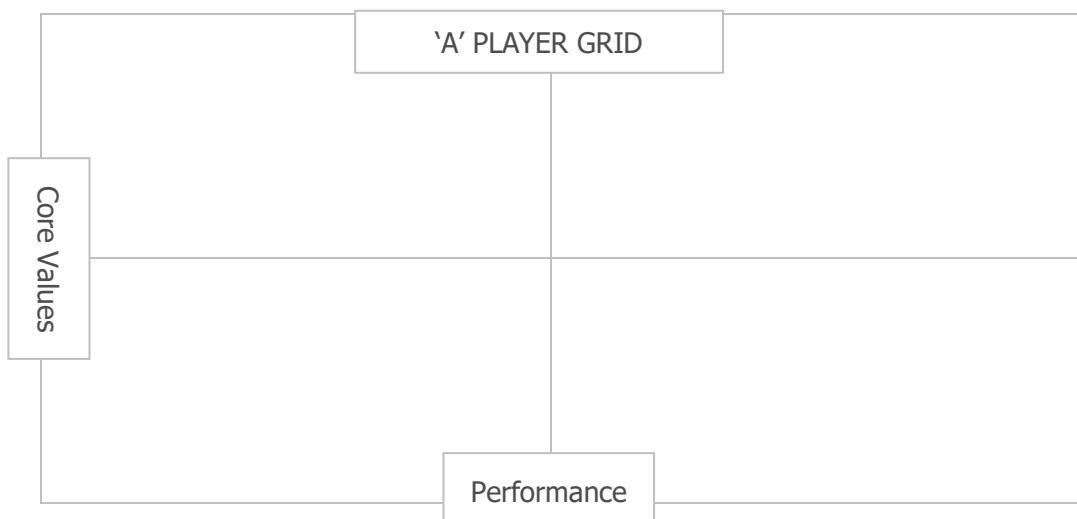
State the date by which these are expected to be achieved and what, if any actions and / or training needs that may be required for these to be achieved.

No.	Objective and / or Target	Actions and / or Training Required	Achievement Date
1	Continue reading 1 book per month		
2	Continue membership in BNI		
3	Gain 2 more business coaching clients		
4	Gain 1 additional scaling up client		
5	Increase monthly income to £XXXXXX		
6	Improve emotional intelligence		
7	To have £XX,XXX on deposit		

(These targets lift directly from the Quarterly Business Plan)

Core Values (Kinnery)

- Nothing is more important than our client and their business
- Our business is to know and understand our client intimately
- We commit to growing ourselves, the client and their business
- A measure of our success is the fun we will have
- We are all ONE team including the client and their staff



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Current Level of Capability and/or Knowledge

(1-3 poor, 4-6 satisfactory, 7-9 good, 10 excellent)

The employee's capability or knowledge (delete/amend any that are not applicable) in the following areas in terms of their current role requirements should be scored as follows:

(If appropriate supporting evidence should be brought to the review)

(These should be bespoke to the employee and their role)

No.	Criteria	Employee Self-Assessment Score	Appraiser's Assessment Score
1	Understands and can evidence behaviour that matches our core values		
2	Ability to make things happen (execute)		
3	Enthusiastic, energetic and able to transfer enthusiasm		
4	Proactive – takes charge		
5	Proactive – makes decisions		
6	Proactive – uses initiative		
7	Positive – can do attitude		
8	Logical – thinks in a logical fashion		
9	Bold – will give it a go and take a punt		
10	Bold – will stand up to IK		
11	Is attractive to be around		
12	Shows emotional intelligence		
13	Highly computer literate		
14	Understands our business		
15	Understands our customers		
16	Open minded and keen to learn		
17	Shows evidence of appropriate and deliberate change		
18	Reads widely		
19	Personable – bonds quickly		
20	Personable – bonds well		
21	Builds positive and strong relationships		
22	Works accurately		
23	Works quickly		
24	Caring		
25	Meets deadlines		
Total score:			
Note: the possible maximum score based on 10x number of key objectives listed			

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Overall Comments

Employee's Overall Assessment of Performance (since last Review)

Appraiser's Overall Assessment of Performance (since last Review)

Recommendations:

Date of Next Review:

dd/mm/yy