

EMPLOYEE NAME Sample

DATE: Sample

This is where you document the completion of the current performance and development cycle. Review your notes from your Step 2 conversations then complete the following sections.

**What went well? Summarize achievements or progress made towards meeting goals and learning objectives**

Goal #1 – customer satisfaction survey results increased by 12.5% While this is slightly below the target of 15% it is a considerable achievement given the timing of the new policies that created confusion and di  
Aicipations to increase client team members.

Goal #4 – I am enjoying my committee work and look forward to it each month. The relationships I've developed have been helpful in my departmental work. I think I'm making a differen  
d rmo

**What could have been better? Identify any unexpected barriers or challenges and what needs to be done to address them. Bring any outstanding goals forward for the next performance development cycle.**

I'm hoping we can continue to increase client satisfaction scores now that most of the policy implementation issues are complete. This will be a continual learning process for me and will carry on into next year. I would like to continue to bring one client issue to each of our meetings for debrief.

The user manual project got off to a slow start and as a result I was wasn't able to meet the milestones we originally identified.

I would like to take the second course I require for my certification, so will put that request in my learning goals for early next year.

**List additional accomplishments, contributions and key strengths**

My openness to learning new skills and then applying them.

Good technical and analytical problem solving skills have helped us to streamline several processes and reduce error rates.

Interpersonal communication skills are an asset to the team.

