

Employer Tools

Evaluating Performance and Potential



Allstate[®]

Business Insurance

No purchase or quote is necessary.

Evaluate Performance Potential

Employee Data

Employee Name:

Date of Hire:

Date in Position:

Department:

Location:

Current Position:

Last Year's Performance Rating:

Overall Tenure:

Position Tenure:

Manager's Evaluation

This Year's Performance:

Potential:

Recommended Position:

Readiness:

Willingness to Relocate:

Individual Development Plan in Place:

Performance/Potential:

Leadership Potential

		Low	Moderate	High
Performance	High	High Performing / Low Potential	High Performing / Moderate Potential	High Performing / High Potential
		Demonstrates consistent high performance with limited upward mobility; may possess specific skills and knowledge of significant value to the organization. Highly valued, seasoned professional.	Demonstrates high potential and consistently meets performance expectations.	Highest potential for senior leadership position who usually always exceeds performance expectations.
	Moderate	Moderate Performance / Low Potential	Moderate Performance / Moderate Potential	Moderate Performance / High Potential
		Has limited potential to advance, and has yet to meet performance expectations.	Demonstrate satisfactory performance; meets organization's expectations in current role; may have moderate potential to advance over time.	Consistently meets and sometimes exceeds expectations, and has demonstrated a great of potential.
	Low	Low Performance / Low Potential	Low Performance / Moderate Potential	Low Performance / High Potential
		Demonstrates consistent low performance and limited potential of upward mobility.	Not delivering results; demonstrates some potential.	Demonstrates high potential for advancement but is not meeting current performance expectations.

Employee Name

Individual Development Plan (IDP)

Employee Name **Position** **Department** **Time in Position** **Org. Tenure**

Indicate your willingness to relocate

- ____ Yes, open to anything
 ____ Limited (List locations you would consider) Not now but in the future
 ____ No

Key Strengths

Please list what you believe to be your key technical or behavioral competencies, skills, or knowledge.

- 1 _____
 2 _____
 3 _____

Short-Term and Long-Term Career Goals

Identify the career path and / or desired next position(s) you would be interested in pursuing.

Identify the key technical or behavioral competencies, skills, or knowledge which need improvement for long-term career success.

- 1 _____
 2 _____
 3 _____

The employee should complete and the Manager should edit as needed and review completed form.

Development Objectives	Action Steps	Manager Support	Success Measures	Target Completion Date
1	_____	_____	_____	_____
	_____		_____	_____
	_____		_____	_____
2	_____	_____	_____	_____
	_____		_____	_____
	_____		_____	_____
3	_____	_____	_____	_____
	_____		_____	_____
	_____		_____	_____
4	_____	_____	_____	_____
	_____		_____	_____
	_____		_____	_____
5	_____	_____	_____	_____
	_____		_____	_____
	_____		_____	_____

Individual Development Plan (IDP)

Managers Assessment

Post IDP completion, indicate this employee's readiness to be promoted to the next organizational level.

- Qualified to move now
- Within one to two years
- Within two to four years
- Well Placed
- Wait and See
- Performance Action

Recommended Next Position

List the next position / assignment that would be most benefit the individual in his / her development.

Managers Name

Managers Job Title

Date

Identify Critical Positions

Position for Evaluation

Position:

Incumbent Name:

Impact on Business Results

Involves identifying and/or developing growth opportunities:

Involves developing strategy or designing new products:

Optimizes business processes and resources that drive performance:

Drives revenue:

Risk to the business if position is left vacant:

Manages other critical positions:

Involves relationships with external customers:

Requires exercising broad decision-making authority:

Requires using a wide range of skills and/or using rare skills:

Degree of competition for this position in the marketplace:

Total Impact:

Retention Outlook for Employees

Future career opportunities are present within the organization:

Total compensation is favorable compared to market rates for the industry:

The position involves challenging and stimulating work:

The Employee is considered High Performing:

Employee is free from factors that increase the vacancy risk of the position:

Retention Outlook Total:

Priority of Positions: