

Employee Performance Reviews



About this automation:

Use this process to send a reminder task and create documents required for regular employee performance reviews.



Simply import the sample automation, customise to suit your practice, test and activate!

Performance & Development Program

Employee name:	<ClientName>
Position:	<FYI_custom_Employee_Role>
Manager:	<Managers>
Review date:	To be scheduled shortly

Review
The employee should complete the questions performance feedback prior to the appraisal meeting, then submit to their leader. The leader will add their comments to feedback provided by the employee. This is an opportunity to provide feedback, set goals for the next 6 months and discuss career aspirations.

1. Overall, how are you going in your role?
What areas of your job do you enjoy? What areas do you enjoy the least? Do you have any roadblocks or concerns?

Employee Comments:

2. What do you think you do well?

Employee Comments:

Manager comments/feedback:

3. What areas do you think you could improve?
Reflect on tasks/projects/areas of your job that have not been as successful or have room for development

Employee Comments:

What's included:

- ✔ Performance Review Document & Email Templates
- ✔ Automation Process Steps

FYI: Employee Performance Reviews

This process sends a reminder task and create documents for regular employee performance reviews to the team member responsible for running the performance reviews.

Performance & Development Program

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Employee Comments:

Knowledge

Templates Directors Files & Papers Knowledge Base Policies & Procedures Task Templates

Active Performance

Type	Template Name	Name	Modified by	Modified on	Status
<input type="checkbox"/>	Performance and Development Program	Performance and De...	System	22 Nov 2023 10:16	Active
<input type="checkbox"/>	Performance and Development Program Template	Performance and De...	System	22 Nov 2023 10:16	Active

Step	Application	Action
1	FYI Actions	Create Task • A task will be created with the subject "Book in performance review for ([TriggerEmployeeName])"
2	FYI Actions	Create Word • A Word document will be created from the "Performance and Development Program Template" template • The document will be filed as "Performance & Development Review - ([TriggerEmployeeName]) - ([now])" in the Employees cabinet • A task will be created with the subject "Performance Review"
3	FYI Actions	Create Email • An Email will be created from the "Performance and Development Program" template • Created email will be immediately sent • The document will be filed as "Performance & Development Review - ([now])" in the Employees cabinet
4	FYI Actions	Delay • The process will be delayed for 7 days
5	FYI Actions	Alter Document • 2: Create Word > Document will be filed as "[OriginalFileName]" in the Employees cabinet • A task will be created with the subject "Review employee responses, update document for review meeting"
6	FYI Actions	Create Task • A task will be created with the subject "Finalise review and next steps"

How to import:

Before you begin - ensure your Employee View has been saved.

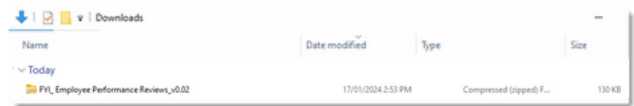
- Employee Status = Active

Name	Email	Partner	Manager	Active
<input type="checkbox"/> Carl Davies	carl.davies@thegrowthpartners	Olivia Williams	-	<input checked="" type="checkbox"/>
<input type="checkbox"/> Cathy Woods	cathy.woods@thegrowthpartners	Harry Spies	Liz Hurst	<input checked="" type="checkbox"/>
<input type="checkbox"/> Crystal Rich	crystal.rich@thegrowthpartners	Crystal Rich	-	<input checked="" type="checkbox"/>

Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You do not need to extract the files.



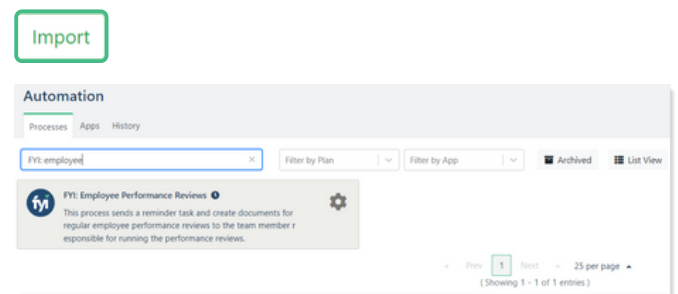
Step 2 - Import the files into FYI

Navigate to the Automations screen and click the Import button on the right-hand side of the screen.

Locate and select your saved "Employee Performance Review" file and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.



Step 3 - Review the process

Review the Templates

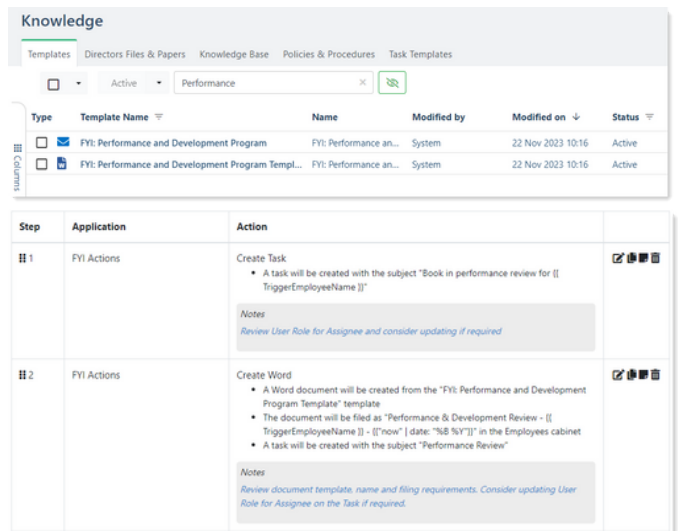
Locate the templates in Knowledge - Templates. The templates will import with the prefix FYI making them easy to locate.

- Review and personalise the imported templates
- Update the template Status to Active.

Edit and Review Each Process Step

The Custom Process is imported with the Status set to Draft. You can locate the process by searching in the "Search processes" field.

- Review the schedule and owner
- Review and update each process step. Specific comments have been added to the steps where action is required. These will display in blue.



Step 4 - Test and run the automation

Click the Test button to display a list of Employees.

From Select Test Employee, search and select a specific employee to run the test for and select Run Test. A Test Employee is handy for testing scheduled automations.

Review the test by clicking the View History link, or from the Employee workspace.

When ready, set the Status to Active. The process will run automatically according to the schedule.

