Employee Performance Reviews Process Automation

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:	eClientName*	
Position:	«FYI_custom_Employee_Role»	
Manager:	eManagera	
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 privride feedback, sort goals for the next months and discuss career appraisms.

 Overall, here are you going in your role? What areas of your job you enjoy? What areas do you enjoy the least? Do you have any readdlocks or concerns? Employee Comments:

2. What do you think you do well' Employee Comments:

3. What areas do you think you could improve?

Employee Comments:

What's included:

Performance Review
 Document & Email Templates
 Automation Process Steps

	Performance Reviews 0	1	Templat	es Directors Files &
	ends a reminder task and create documents for		-	
regular employ	ee performance reviews to the team member r			 Active
esponsible for a	running the performance reviews.		Туре	Template Name
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Position:	«FYI_custom_Employee_Role»		1	FYI Actions
Manager:	«Manager»			
Review date:	To be scheduled shortly			
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Know	vledge					
Templa	tes Directors Files & Papers	Knowledge Base Po	olicies & Procedures Ta	sk Templates		
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4	FYI Actions	Delay • The pro	cess will be delayed for 7 o	lays		
15	FYI Actions	Employ A task v	ent te Word > Document will b ees cabinet vill be created with the sub ent for review meeting"			C & F &
6	PYI Actions	Create Task • A task v	will be created with the sub	ject "Finalise review ar	nd next steps"	C

How to import:

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

• Employee Status = Active

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.

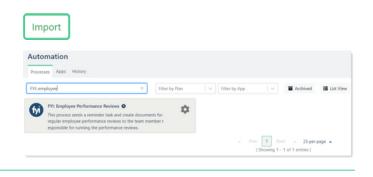
From Select Test Employee, search and select a specific employee to run the test for and select Run Test. A Test Employee is handy for testing scheduled automations.

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.

Ρ	ractice				
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	Active Employees	Search employees ×			59 ro
	Name	Email	Partner	Manager	Active 👻
	Carl Davies	carl.davies@thegrowth.partners	Olivia Williams		0
8	Cathy Woods	cathy.woods@thegrowth.partners	Harry Spins	Liz Hurst	S

Name	Date modified	Type		Size
~ Today				
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			ent template, name and fi nee on the Task if required.		onsider updating User		

Select Test E	Imployee	
Employee Name Ignore Process Filter	NO	
	Employee	
0	Aaron Test	
0	Amanda Bailey	
0	Anna Jordan	
	Run Test Cle	