

One-to-ones

You and your manager can use this page to track your one to ones

- Use the box below for any notes and add to them as you go along
- Use the Development Objectives page to make progress updates
- If you want to share what you've written, use the Next Steps tab (note: this will share everything you've written, not just what's on this page).

This is where the assessment is typed in

Objective Review

A review of objectives set previously

How have you got on with your objectives? If you haven't been able to achieve all of them, set out why and what you might do differently to achieve them (you might be carrying them over to the next year).

*Displays a list of objectives for the current or previous appraisal cycle
Note, this slot will also show any older objectives that have not been marked as Finished by the appraiser. Select a template:*

Objectives



What objectives do you think we should set for next year?

Add your new objectives here - they can be reviewed and amended during the appraisal meeting.

Displays a list of objectives for the next appraisal cycle and an 'Add' button Select a template:



Comment on how well you have performed on your objectives overall

This is where the assessment is typed in

Client Retention

What went well, what could have gone better, and what to do for next time

Your ability to retain the client

Describe your relationship with the client and select a rating

Rating	Description
4	Retained client, delivered exceptional service (achieved a 4 for service standards) and created a lead for follow up
3	Retained client and delivered exceptional service (achieved minimum 3 in service standards)
2	Retained client throughout the period of contract
1	Client requested consultant to be removed from account due to consultant service delivery.

1	2	3	4	<i>Please select</i>
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This is where the assessment is typed in

Add a supporting document (optional)

Behaviours - Passion

Select specific competencies or skills that should be reviewed

Passion

We are energetic, take responsibility and seek to go above and beyond, thus achieving extra ordinary results. We inspire customers and feel good about what we do. We have an entrepreneurial spirit and are positive and passionate about our exceptional levels of service. We create an environment in which people seek to work with us.

How these behaviours help to enhance our culture:

- Encourages everyone to go the extra mile and continually seek excellence
- Drives innovation and the feeling of wanting to do more
- Embeds a culture of positivity
- Helps us to feel proud of our achievements
- Further differentiates us from our competitors

1	2	3	4
Minimum Standard	R&M Standard	Exceeds R&M Standard	Aspirational Standard
<p>You come to work wanting to do a good job</p> <p>You complete work assigned to you</p> <p>You are honest</p> <p>You show a commitment to delivering good service</p>	<p>You openly support your colleagues</p> <p>You are motivated and focused</p> <p>You give every aspect of your role 100%</p> <p>You have a positive attitude and demonstrate ownership of your role</p> <p>You deliver a service level you are proud of</p> <p>You take responsibility when something has gone wrong and do everything possible to ensure it doesn't happen again.</p>	<p>You motivate others around you</p> <p>Demonstrate a 'can do' attitude to everything</p> <p>You deliver innovative solutions to colleagues and customers.</p> <p>You go out of your way to support others, even if the task falls outside your immediate work area.</p> <p>You put energy into finding a solution for any challenge presented</p>	<p>You continually think outside the box to deliver excellence to our clients</p> <p>You continually think from your clients' point of view and suggest improvement ideas that will enhance their experience.</p> <p>You take responsibility for instilling a sense of team harmony and enjoyment</p> <p>You look to understand what drives passion in others and adapt your style to enhance this.</p>

1	2	3	4	Please select
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Behaviours - Fun

Fun

We enjoy what we do. We share stories and successes, engage with each other with banter and laughter and avoid taking ourselves too seriously. We keep smiling even when facing adversity. We empower others around us and engage positively. We celebrate our successes.

How these behaviours help to enhance our culture:

- Create a positive, fun working environment
- Gives R&M a reputation for being a fun and enjoyable place to work
- Contributes to us becoming the employer of choice
- Helps employee retention
- Encourages the flow of ideas

1	2	3	4
Minimum Standard	R&M Standard	Exceeds R&M Standard	Aspirational Standard
You are approachable	You come to work with a positive attitude	You don't take yourself too seriously	You pro-actively share success stories of your colleagues
You say hello to others	You seek to build positive relationships	You balance commitment to the job along with having a good sense of humour	You are the positive influence throughout challenging times
You make time to laugh with your colleagues	You are light hearted	You ensure written communications are delivered in a positive and engaging way.	You encourage others to see the positive side of a challenge and help them to put it into perspective.
You are polite to people at work	You are solutions focused	You move on quickly from challenging situations	You encourage banter with others
	You want to be part a team	You take personal responsibility for contributing to a happy work environment	You are always objective and support others towards success
	You see engaging with others as part of your role		

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Behaviours - Care and Consideration

Care and Consideration

The welfare and well-being of our customers and colleagues is core to our approach. We treat others as we would want to be treated ourselves, demonstrating compassion and empathy. We remain patient and thoughtful, and consider the needs of others. This builds mutual respect, admiration and enhances how we work together.

How these behaviours help to enhance our culture:

- Creates a positive working environment where employee welfare is key
- Encourages exceptional service
- People feel like they are cared for and their thoughts/feelings matter
- Creates a culture of mutual respect and understanding
- Positively contributes to employee retention

1	2	3	4
Minimum Standard	R&M Standard	Exceeds R&M Standard	Aspirational Standard
<p>You say thank you</p> <p>You treat others with respect</p> <p>You listen</p> <p>You think of other people's feelings</p>	<p>You show compassion for your colleagues in times of need</p> <p>You make time for your clients and colleagues - listen to what they are saying to us</p> <p>You demonstrate care in every aspect of your role</p> <p>You are respectful and considerate to those around you</p> <p>You are calm and patient even in challenging times</p> <p>You look out for the welfare of your colleagues</p>	<p>You are conscientious in your role</p> <p>You balance giving time to others against the demands of your job</p> <p>You make time to support a colleague in need</p> <p>You make effort to understand things from someone else's point of view.</p> <p>You share feedback/challenges with colleagues in a considerate and balanced manner</p> <p>You show recognition to others</p>	<p>You consider other peoples' feelings and take action to safeguard these feelings</p> <p>You show the same care to everyone even though you may have differing opinions</p> <p>You manage your personal reactions professionally, calmly and with care.</p> <p>You are an inclusive person and encourage everyone to share their views</p> <p>You foster a sense of belonging with your colleagues</p> <p>You share feedback in an objective way and deliver it how you would like to receive it.</p>

1	2	3	4
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Please select

Behaviours - Making A Difference

Making A Difference

We are dynamic, encourage spontaneity and we stand out from the crowd. We create better experiences and we ensure that both customers and colleagues feel special. We have a sense of pride, ensuring positive change and impact. We are not afraid to be brave and imaginative in our solutions. We aim to change people's lives for the better.

How these behaviours help to enhance our culture:

- Create a feeling of being part of something special
- Helps us to engage with new ideas/approaches
- Positively contributes to employee retention
- Creates a positive, supportive culture
- Creates a feeling of empowerment to give something new a try

1	2	3	4
Minimum Standard	R&M Standard	Exceeds R&M Standard	Aspirational Standard
You deliver what is asked of you	You are enthusiastic about your role	You think on your feet to deliver innovative solutions	You think on behalf of your client and propose solutions that add value to their experience
Your work is of an acceptable quality	You deliver a service level you are proud of	You continually look for ways to add value to your client's experience.	You take pride in making your clients feel special
You accept change when directed to	You are flexible to a changing situation and adapt your behaviour accordingly	You go beyond what is expected of you to ensure your client is happy	You encourage your colleagues to challenge their own thinking
You implement ideas suggested by others	You deliver high quality, accurate work	You are happy to try a new approach even though it is outside of your comfort zone	You support others to maintain a positive attitude in times of challenge.
	You are friendly yet demonstrate a professional attitude.	You take pride in your own work and that of your team.	You bring ideas to the table that drive positive change for the wider team

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 3

 4

Behaviours - Open Mindedness

Open Mindedness

We take time to listen and understand what our clients and colleagues are saying to us. We do this without pre-conceptions and we are determined to be fair and honest. We ensure fair process, embrace change and new ideas and we look for innovative solutions. We communicate without criticism and learn from past experiences.

How these behaviours help to enhance our culture:

- Creates an inclusive environment where people feel they can express ideas
- Helps everyone to feel they have a voice
- Demonstrates how we embrace diversity
- Helps people to feel we are an honest organisation
- Showcases Reed & Mackay as a progressive organisation

1	2	3	4
Minimum Standard	R&M Standard	Exceeds R&M Standard	Aspirational Standard
<p>You respond to change initiatives when directed to</p> <p>You communicate in a professional manner</p> <p>You attend learning sessions when prompted to</p> <p>You ask questions before making judgements.</p>	<p>You go the extra mile for your clients/colleagues and take on board their feedback</p> <p>You own up when something has gone wrong and are honest about it</p> <p>You actively listen to your clients and colleagues</p> <p>You obtain all the facts before making a decision</p> <p>You are positive about things when they change</p>	<p>You are always objective and do not look to blame</p> <p>You use personal mistakes as learning opportunities</p> <p>You ask the right questions to get the most out of a conversation</p> <p>You suggest ideas for different ways of approaching things</p> <p>You view feedback objectively and see it as an opportunity for change</p> <p>You are self-aware in how your behaviour can impact others</p>	<p>You listen objectively without forming judgement even if you don't personally agree</p> <p>You encourage others to drive change and you support these initiatives in coming to life</p> <p>You are fair and ask others for their point of view</p> <p>You are a skilled communicator and you tailor your communication style to your audience.</p> <p>You encourage others to take ownership for their personal development</p>

1 2 3 4

Please select

Behaviours - Participation

Participation

We collaborate and operate as one team. Everyone's contribution matters. Our results are a team effort and are only possible when we actively engage together and with our customers. We share the rationale and reasons behind our decisions. We respect the talents of others and operate without reliance on hierarchy. We are inclusive and explore ideas in a safe supportive environment.

How these behaviours help to enhance our culture:

- Helps us to be a more 'joined up' business
- Enhances our efficiency as we're all working in synergy
- Quick decision making processes with a short hierarchy
- Promotes a respectful organisation where everyone feels a sense of involvement
- Encourages idea generation

1	2	3	4
Minimum Standard	R&M Standard	Exceeds R&M Standard	Aspirational Standard
You ask for help when needed	You contribute to projects/initiatives when prompted	You ask someone else for their opinion and welcome their input	You ensure that everyone around you has their voice heard
You offer your view when requested	You listen to viewpoints of others	You feel empowered to make suggestions for change	You respect the opinions of others even if it varies from your own
You show commitment to your role	You accept feedback given to you	You support each of your colleagues to get the job done	You are creative in your thinking and will regularly make suggestions for improvement
You show positive team spirit.	You work hard to be the best you can	You pro-actively get involved in business projects and make a positive contribution.	You engage with others to work out the 'best' solution
	You want to be involved and recognised	You actively share knowledge to support others	You clearly explain the rationale behind your ideas

1	2	3	4	<i>Please select</i>
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Service Standards - Calls

Call Service Standards

Listen to two random calls and rate against the four elements below. Make sure you add an overall score for the calls, with comments, at the bottom of the page.

Call Handling

(uses caller's name at least once; confidently builds rapport; does not interrupt/talk over caller; minimal use of hold function)

1	2	3	4	<i>Please select</i>
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Accuracy

(uses probing questions; uncovers traveller's needs; paraphrases appropriately; collects data efficiently; reconfirms request details)

1	2	3	4	<i>Please select</i>
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Adding Value

(pre-empts traveller's needs; proactively seeks best travel solution; adopts a consultative approach; proactively offers and explains savings; offers additional services beyond initial request)

1	2	3	4	<i>Please select</i>
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Service

(warm and professional from beginning to end; displays up-to- date travel knowledge; meets and/or exceeds client's expectations; explains next steps and follow-up; leaves caller feeling informed and confident)

1	2	3	4	<i>Please select</i>
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OVERALL CALL STANDARDS SCORE

Please add time/date of calls listened to and comment on how these were handled.

1	2	3	4	<i>Please select</i>
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This is where the assessment is typed in

Service Standards - Emails

Suggestions for training to be completed

Structure

Email is structured in a clear, concise manner and a subject line is always included. Email content is presented in a clear manner, using a plain font and follows a logical flow. Communication is structured so it's clear for the recipient to follow. Sender structures email in preparation that it will be forwarded

1	2	3	4
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Please select

Grammar

Correct English grammar is used in all emails. Messages are written in a clear and concise manner. Email is written in a personal manner and without the use of slang, emojis or capital letters.

Email is written in short paragraphs with correct punctuation/headers used appropriately.

Proof read emails prior to sending.

1	2	3	4
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Please select

Professionalism

Email is acknowledged within the agreed SLA.

Language used is professional, business-like and positive at all times

Use of industry jargon is avoided with clear explanations for technical terms given.

All emails are spell checked prior to being sent.

R&M branding is included on all emails with appropriate use of bold and colour

Build a professional relationship with the booker as far as possible on email.

1	2	3	4
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Please select

Consultative/Value Added Approach

Emails should pro-actively offer additional services that the client may benefit from.

Emails should always take a consultative approach and describe the value of any given service.

Demonstrate up to date and relevant knowledge and take a consultative approach to every booking.

1	2	3	4
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Please select

OVERALL EMAIL STANDARDS SCORE

Please add comments to support the rating and upload the two emails used in the slots below.

1	2	3	4
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Please select

This is where the assessment is typed in

Traveller Experience

Traveller experience evaluation

All consultants are required to contact their travellers at least once a month preferably over the phone post trip to glean feedback on how the trip went and identify any opportunities for future changes in travel arrangements. The following grid will apply monthly to all consultants:

Rating	Description
4	3 TEE's completed per month
3	2 TEE's completed per month
2	1 TEE completed per month
1	0 TEE's completed per month

1 2 3 4 Please select

This is where the assessment is typed in

Personal Development Plan

A review of objectives set previously

Any other points you'd like to make at your appraisal?

This is where the assessment is typed in

Add a question here

SOM's overall rating

1 2 3 4 Please select

