

The Performance Review - Employee

Summary

1 Introduction

2 The Performance Review form

3 Filling in the Performance Review form

Employee Preparation

Synthesis and Employee's Acknowledgement

View a Completed form

1

Introduction

1 Presentation of the Performance Review



It is...

- An **opportunity** to discuss honestly and objectively.
- **Sharing on the past year**, in particular on Leadership Essentials and Goals.
- A **constructive dialogue** to prepare for the future.

Which stakes ?



- Identify **performance goals** and support **skill development**.
- Evaluate **Employee Performance**.



For whom ?

- All **Executive Employees, Staff** (directly in ColasWay) and **Workers**.

When ?



During the campaign:

- **Annually for all employees – Staff, Workers and Executives.**

The Performance Review- Goals for...



The Employee

- Discuss mission and set goals.
- Share your feelings, your professional projects, and your ideas for development.
- Ask questions to your Manager on various topics.



The Manager

- Get to know your Employees better and adapt your Management.
- Evaluate their skills and the achievement of the objectives set.
- Support their development by giving them the means to progress.
- Be a role model to Employees.



The Top Management

- Monitor the activity and progress of each one of your Employees.
- Consider their aspirations.
- Support training plans.
- Manage resources according to business developments and corporate needs.

B Road Map

Once the campaign has been launched, the Employee and the Manager set a date for the Performance Review outside ColasWay. Then, they must follow the Road Map with the following steps:

This action should not be performed too early in order to give the Employee time to finalize their preparation. Recommendation : the Manager should complete this action on the day of the Performance Review.



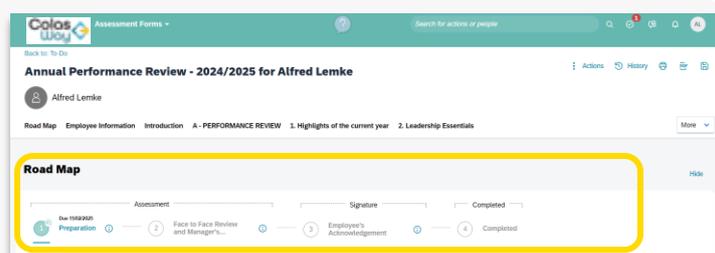
Person who 'leads' the Performance Review form

Manager

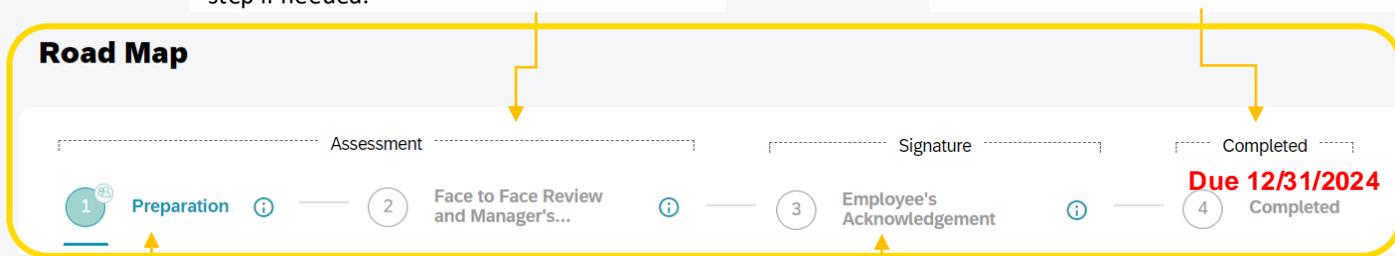
Employee

This Road Map is **visible at the top of the form**.

This is a **face-to-face review** between the Manager and the Employee. **The Manager fills in and signs** the form following the discussion with the Employee. They can send the form back to the previous step if needed.



The form has been **completed** and **can no longer be modified**.



The **Employee and the Manager** have access to the form. Only the Manager can move on to step 2.

The form **can no longer be modified**. The **Employee** can write a summary and **sign** before sending it to step 4. They can send the form back to step 2 if needed.

C The Performance Review : Parts and sections



- Road Map
- Employee Information
- Face-to-Face Meeting (Step 2)
- Introduction



A – PERFORMANCE REVIEW

1. Highlights of the current year
2. Leadership Essentials (L1/L2/L3)
3. Job Skills (L3)
4. Achievement of Performance Goals of the current year
5. Performance Goals for the upcoming year



B – DEVELOPMENT REVIEW

1. Development Goals of the current year
2. Development Goals for the upcoming year
3. Training needs for the upcoming year for the countries using the Training Management System (TMS)
4. Mobility Preferences & Personal Considerations
5. Work-Life Balance Discussion

- Manager's Acknowledgement (Step 2)
- Employee's Acknowledgement (Step 3)

D The Road Map : Parts and sections

This Road Map is **visible at the top of the form**. The navigation bar allows you to easily reach the **sections of the form**.

The screenshot displays the ColasWay Assessment Forms interface. At the top, there is a navigation bar with the ColasWay logo, 'Assessment Forms', a search bar, and notification icons. Below this, the main header reads 'Annual Performance Review - 2024/2025 for Alfred Lemke'. A sub-header shows 'Alfred Lemke' with a profile icon. A yellow navigation bar contains the following sections: Road Map, Employee Information, Introduction, A - PERFORMANCE REVIEW, 1. Highlights of the current year, 2. Leadership Essentials, 3. Achievement of Performance Goals of the current year, and a 'More' dropdown. The 'Road Map' section is active, showing a progress bar with four steps: 1. Preparation (Due 15/02/2025), 2. Face to Face Review and Manager's..., 3. Employee's Acknowledgement, and 4. Completed. A dropdown menu on the right lists the sections under 'A - PERFORMANCE REVIEW' and 'B - DEVELOPMENT REVIEW', with 'B - DEVELOPMENT REVIEW' and its sub-items highlighted in yellow.

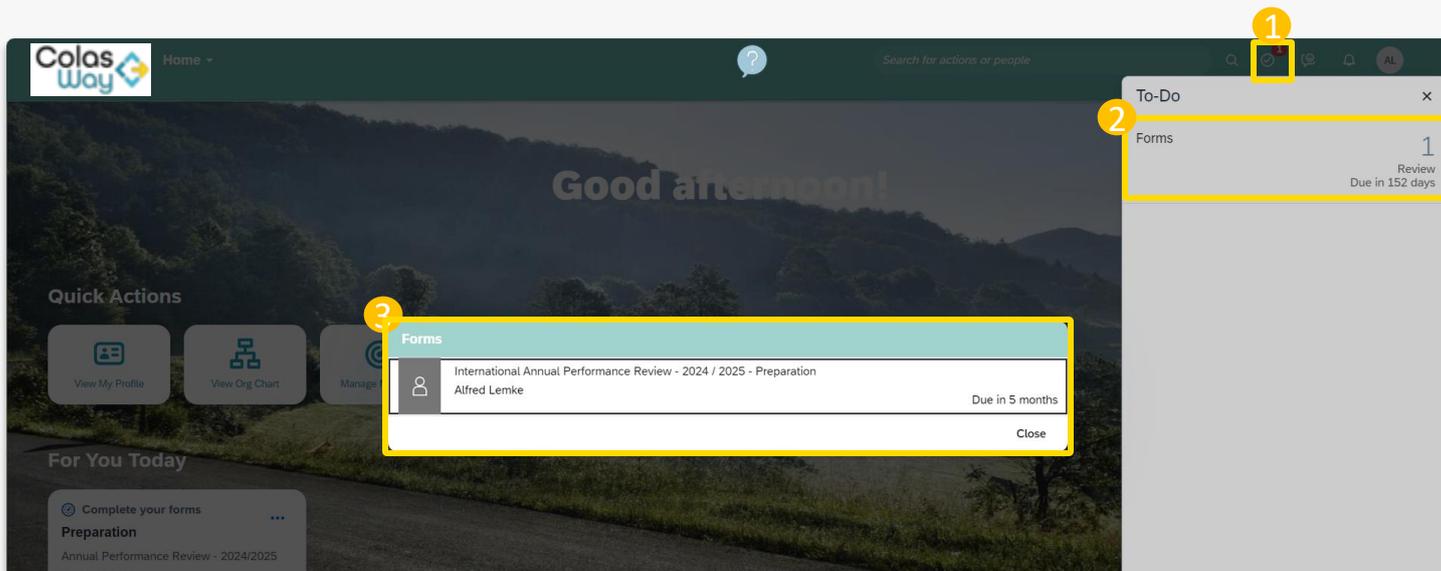
2

Filling in the Performance Review form

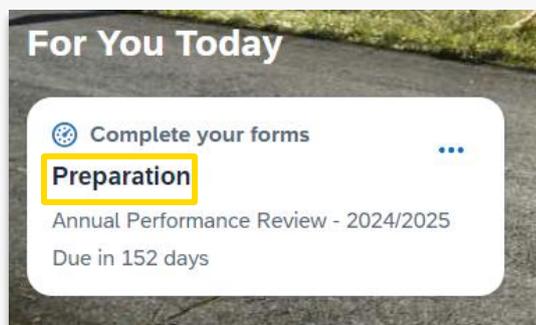
- **A. Employee Preparation**
- *B. Summary and Employee's Acknowledgement*
- *C. View a Completed Form*

A Employee Preparation

A notification appears on your home page for the performance review.



You can also access it directly from your Home page by clicking on the **Complete your forms** tile in the **For You Today** section.



Note that even if the form is to be filled by both Manager and Employee at this Preparation step, the **form will be locked for the other party** if one person is in the review. Make sure you “**save and close**” the form **before exiting the form**, to allow the other party to fill-in their preparation.



Any assessment (self or given) and overall comments will only be visible by both during the next step i.e. the Face-to-face Review and Manager’s Acknowledgment

The **Manager will move the form to the second step** only when they are **done** with their preparation and ready to meet with the employee.

PART A – PERFORMANCE REVIEW

1. Highlights of the current year

This section allows you to describe the key events of the current year.

2. Job Skills (L3)

2. Job Skills (30.0%)

You will find in this section the skills related to the job. Only the manager can add more skills using the library by clicking on the "add" button at the top right of this section. The evaluation must consider at least 3 skills and the maximum 10.

The aim of this section is to enable you to self-assess the skills expected of you. 5 levels are defined, as well as a "Not applicable" level. The skills that appear are linked to the key job your function is attached to.



3. Leadership Essentials (L1/L2/L3)

The aim of this section is to enable you to self-assess the skills expected of you.



- For both sections 2 and 3, evaluate skills by clicking on the stars or the not applicable sign. Move the cursor over the stars to display the level.
- Click on the **question mark “?”** to show the definitions of the scales.
- Click on the **information point “i”** to display the definition of the expected skill.
- Write an overall **comment** in the text box at the bottom of the section.

2. Leadership Essentials (60.0%)



The manager's rating is visible at the Performance Review Meeting and Manager Acknowledgement step.

3. Achievement of Performance Goals of the current year

The goals set for the current year are available in this section.

The weighting of goals is equal to **40% (L1, L2)** and **50% (L3)**.

As an Employee, you **cannot add** or **delete** goals for the **current year** however, you can edit the goal.

- self-assess by clicking on the **stars** or the **non-applicable** sign.
- click on the **question mark “?”** to show the definitions of the scales.
- you can add a comment to each goal for the current year .

3. Achievement of Performance Goals for the Current Year (40.0%) + /

Evaluate the achievements of the current year's goals.

[Expand All](#) [Collapse All](#)

Goal	Rating by Ellen Meister 	Action
> Track turnover for 2024	     Choose an evaluation	 

4. Performance Goals for the Upcoming Year



When creating new goals, you can use **the goal creation aid** to follow **the SMART model**.

S

Specific

Goals should be clear and indicate what you expect. **Be specific** and define what you are going to do. **Use action verbs**, such as direct, organize, coordinate, lead, develop, plan, etc.

M

Mesurable

If you can't quantify it, you can't manage it. **Choose goals with measurable progress** and **set concrete criteria** by which you can measure success.

A

Achievable

The goals must be within your reach. If the goals you set are far beyond your ability, you cannot commit to them. The goals must be a big enough effort for you to believe that you can achieve them and that it requires a real commitment on your part.

R

Realistic

Goals should be relevant. Make sure that each goal is consistent with your other goals and aligns with the goals of the company, your Supervisor or your department.

T

Time-bound

Set a timeframe for the goal. Choosing a deadline for your goal clearly defines the target to be reached. Without a time limit, there is no incentive to get started.

User Guide ColasWay

In this section, you must create **at least one performance goal for the upcoming year**. Note that goals must equal 100% or you will not be able to move the review forward.

- Add a goal for the upcoming year by clicking on **+ Add**.
- Edit a goal for the upcoming year by clicking on the **pen icon**



5. Performance Goals for the upcoming year

+ Add

These goals will be evaluated in the performance review process next year. Indicate your performance goals by clicking on the "add" button at the top right of this section.

Choose how you would like to create a goal:

1



Create from Scratch
Create a goal with a blank goal form.

Create Performance Goals :

- Goal name
- Description & measurement
- Weight
- Start date
- Due date

You can also add a comment linked to the goal.

2



Create from Library
Choose goals from your goal library and add to your goal plan.

- **Select a goal template** in the library
- Click on **Next**
- Click on the **pen icon**
- **Edit the goal**
- Click on **Next**
- **Save the goal**

1

2

4

3

5

6

Previous **Save** Cancel

PART B – DEVELOPMENT REVIEW

1. Development Goals of the current year & 2. Development Goals for the upcoming year

These sections allow the Employee to **highlight development** elements **linked to the current review**, and to **outline new needs** for the **upcoming year**.

- **Modify a development goal** by clicking on the **pen icon**.
- Add a new development goal (for the current and/or upcoming year) by clicking on the **+ Add** button.

- Fill in the expected fields.

3. Training needs for the upcoming year for the countries using the Training Management System (TMS)

Fill in your training needs directly in the TMS. A tab opens giving you direct access to the TMS.

4. Mobility Preferences & Personal Considerations

Only the Employee can complete this section. Your Manager can view the content.

- Click on different **hyperlinks** to fill-in your **aspirations**, then acknowledge their review.
- Click on the **+** to **add a mobility / personal consideration**.
- Click the **acknowledgment** button to confirm your review.

4. Mobility preferences & Personal Considerations

If the Employee is willing to relocate geographically or functionally, he/she is invited to indicate his/her preferences by clicking on the links below.

The information provided will be considered for the new opportunities within the Group and can be modified anytime in the employee file.

[Geographical Mobility Preferences](#)

[Functional Mobility Preferences](#)

[Personal Considerations](#)

Employee's Comments : Please remember to complete your mobility preferences and personal considerations using the links above.

B *i* U | | | | | Size

* I acknowledge that I have reviewed my mobility (functional & geographical)

2

Filling in the Performance Review form

- *A. Employee Preparation*
- **B. Summary and Employee Acknowledgment**
- *C. View a Completed Form*

B Summary and Employee Acknowledgement

Once your meeting has been completed and the form signed by your Manager, you have **full visibility of the form, but cannot make any changes** other than your signature.

Employee signature

- Your final rating is displayed.
- The Road Map confirms that we are on **step 3**.

Once you have read the form, you can leave a comment, sign it and close the process (sending to **Completed** status) or send it back to the step 2 (Manager's acknowledgement).

- Write a **comment** in the text box.
- Click the relevant button to **sign the form**. Another page will appear, asking you to **confirm signature**. After signature, the form is no longer editable by you.

Employee's Signature

In reaching this Signature page, you should have reviewed your performance with your manager. By clicking the Sign button, you confirm that you have spoken with your manager and have completed your annual review. Your electronic signature will be stored in this section of the form.

2

Filling in the Performance Review form

- *A. Employee Preparation*
- *B. Summary and Employee Acknowledgement*
- **C. View a Completed Form**

A View a Completed Form

Viewing the completed form:

- From the **Home** drop-down menu, go to **My Forms**.
- The **All Forms** section includes all your forms.
- In the **In Progress** box, you will find the forms that are open and for that you have an action to carry out. They will be in this box until you send them to the next step.
- The **Completed** box includes completed and archived forms.
- The **Form Status** section allows you to view the status of your team's forms (individual or several).

Click on the form to **Open** it.

Forms					
Title	Employee	Current Step	Date Assigned	S	
USA Annual Performance Review -		Preparation	10/15/2024		