

Example performance plan

Personal Plan

Last Updated: __/__/____

Name: Job blogs

Department: Sales

Line Manager:

Next Review: __/__/____

Job Title: Business Development Manager - HNW

1. Competencies

Managing Self – Assumes ownership for his or her own learning and development. Maintains appropriate professional and technical expertise. Acts with a high degree of integrity.

- **Demonstrates Flexibility and Independent Thinking** – Demonstrates willingness to think and act independently.
- **Develops Oneself** – Takes responsibility for seeking out ways to learn and improve continuously
- **Leading the Enterprise** – Contributes to the future success of the overall enterprise by playing an active role in shaping the agenda and acting as a steward for the combined interests of our clients and staff.
- **Shapes the Agenda and Contributes To the Enterprise** – Thinks and acts in strategic terms, contributes to the implementation of strategic direction, and helps to shape future strategic direction. This involves having an organisational mindset and acting in the best interests of the overall enterprise.

Managing Relationships – Demonstrates interest in others and their concerns by creating an environment that fosters mutually positive relationships internally and externally.

- **Builds Strategic Working Relationships** – Builds relationships (both internally and externally) that create win-win solutions for the business.
- **Focuses on the Client/Prospect** – Understands and anticipates the needs and expectations of client/prospects. Client/prospect refers to individuals within organisations being called upon by the Business development Manager.
- **Interpersonal Insight** – The demonstrated ability to effectively read people and situations well, and to use these insights to solve problems and advance relationships.
- **Maximises Personal Impact** – Produces a positive, memorable personal impact on others, and is able to effectively persuade and influence others.

Managing the Operation – Achieve business results by using resources effectively and efficiently, setting clear objectives, orchestrating multiple activities, measuring progress and monitoring the process appropriately.

- **Analyses and Resolves Issues** – Applies a logical, systematic approach to problem solving, with a focus on meeting client/prospect expectations and improving the effectiveness and efficiency of operations. Uses sound judgment when making decisions.
- **Plans and Achieves Results** – Sets and attains challenging goals. Looks for ways to raise standards, improve performance, and do a better job.
- **Conceptual Thinking** – The ability to think and act with a broad perspective when addressing issues and identifying business opportunities.
- **Ethics and Values** – The demonstrated commitment to working in accordance with our values and principles of conducting business.

Comments on Progress

- The jobholder should complete this section with a description of their performance against the measures described above. They should provide examples of their success.
- The jobholder shall pass this completed review to their line manager one week before their appraisal meeting.

2. Personal Objectives

1. Teamwork

- Identify, gather and share competitor and market intelligence and needs with sales team and other departments to improve the company proposition.
- Collaborate with sales team – internal sales executives and other regional teams.
- Participates in and adds value to team sales meetings.
- Takes ownership of tasks on behalf of the team and seen as a subject-matter expert for the team when required.
- Supports colleagues with knowledge and learning to help colleagues grow and develop as an overall strong team.
- Leads/participates in corporate projects and duties when assigned.
- Delivery of assigned team responsibility.

Comments on Progress

- The jobholder should complete this section with a description of their performance against the measures described above. They should provide examples of their success.
- The jobholder shall pass this completed review to their line manager one week before their appraisal meeting.

2. Self Development

- Develop deep understanding of our shared beliefs and values: culture, key business strategies and priorities.
- Seek feedback from colleagues and customers.
- Completes initial training requirements i.e. on-line modules, reading, etc.
- Identifies areas of improvement, sets a development plan and reports progress.
- Develop greater understanding of adviser tools, e.g. know your client, attitude to risk, investment process and client review.
- Improve objection handling/influencing skills.
- Improve personal impact.

Comments on Progress

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- The jobholder shall pass this completed review to their line manager one week before their appraisal meeting.

3. Execution/Targets

- Acquire 20 new HNW client relationships during the business year.
- Introduce £25m of new assets under management during the business year.
- Retain 95% of client relationships and 95% of assets under management.
- Deliver 10 client-facing seminars during the current business year.
- Create 2 new Professional Connections who introduce clients during the current business year.
- Represent our business at the Midlands Business Leaders Group.

Comments on Progress

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- The jobholder shall pass this completed review to their line manager one week before their appraisal meeting.

4. Managing Relationships/Business

- Develop and build relationship with third parties e.g. introducers and otherwise; travel and participate in joint meetings and events.
- Raises awareness of our products and related services and deliver key business messages through targeted prospecting activities.
- Understands territory and produces targeted, segmented prospect lists and prioritises sales activities by value.
- Develop a high level of expertise related to industry and marketplace development. Use this knowledge to become a trusted partner to clients and prospects.
- Maintain conversation with a wide audience on a systematic basis; set and deliver clear, ongoing communication plan with clients/prospects.
- Shows sound understanding of individual clients and tailors approach accordingly.
- Be able to identify key influencers within specified market/territory and leverage these resources to build awareness of our business.

Comments on Progress

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- The jobholder shall pass this completed review to their line manager one week before their appraisal meeting.

5. Good Citizen

- Develop and leverage internal contacts in other areas to learn more about other parts of our business.
- Identify and suggest any process improvements in own and other areas within our business.
- Manage and documents complaints appropriately.
- Conducts business in line with the policy and procedures laid down by the Governance committee.
- Perform in excess of the Sales Team Minimum Standards.

Comments on Progress

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- The jobholder shall pass this completed review to their line manager one week before their appraisal meeting.

6. Compliance Objective

- Fulfilling and upholding all the compliance requirements of your role, including fulfilling training requirements.
- Acting with integrity and demonstrating the highest ethical standards at all times.

Comments on Progress

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- The jobholder shall pass this completed review to their line manager one week before their appraisal meeting.

Jobholder General Comments – Last updated on:

The Jobholder should summarise the review period performance here:

Manager comments

The Line Manager should summarise the review discussion here:

1. Observations on performance against KPIs.
2. Priority areas of development for the next review period.
3. Position to bonus/reward position.

