Performance Appraisal (KPI Scorecard)

Feature

Align effort with strategy, empower growth, and make every appraisal count

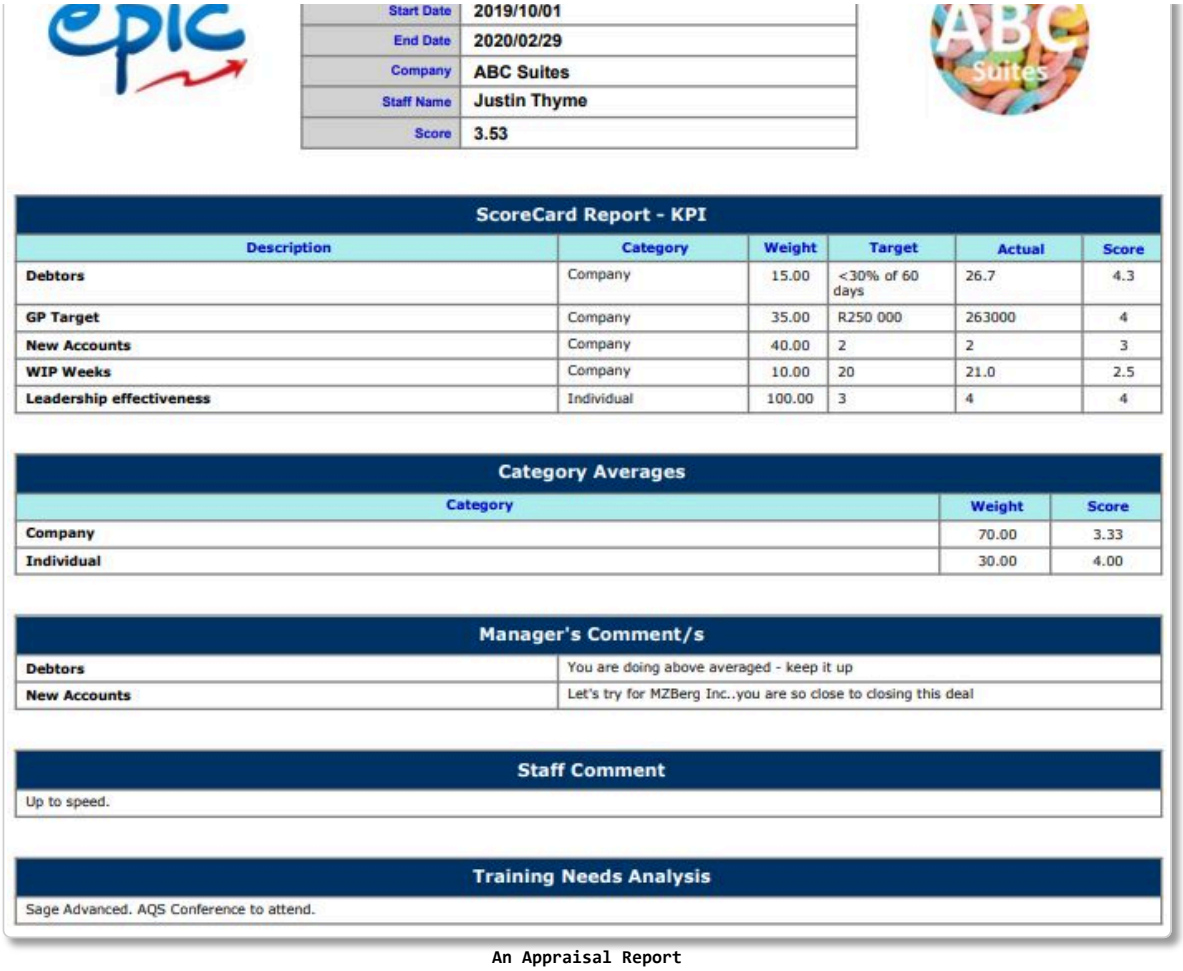


Epic's **Performance Appraisal** feature delivers a structured, transparent, and customisable framework for evaluating individual and team performance—aligning effort with strategic goals and fostering a culture of accountability and growth.

Whether using numeric scores, descriptive ratings or balanced scorecard pillars, the system ensures that every appraisal is fair, evidence-based, and tailored to your organisation's needs.







Start Date	2019/10/01
End Date	2020/02/29
Company	ABC Suites
Staff Name	Justin Thyme
Score	3.53

ScoreCard Report - KPI

Description	Category	Weight	Target	Actual	Score
Debtors	Company	15.00	<30% of 60 days	26.7	4.3
GP Target	Company	35.00	R250 000	263000	4
New Accounts	Company	40.00	2	2	3
WIP Weeks	Company	10.00	20	21.0	2.5
Leadership effectiveness	Individual	100.00	3	4	4

Category Averages

Category	Weight	Score
Company	70.00	3.33
Individual	30.00	4.00

Manager's Comment/s

Debtors	You are doing above averaged - keep it up
New Accounts	Let's try for MZBerg Inc..you are so close to closing this deal

Staff Comment

Up to speed.

Training Needs Analysis

Sage Advanced. AQS Conference to attend.

An Appraisal Report

Key Functions

- Custom Appraisal Periods: Administrators define appraisal cycles, and individuals select the relevant period from a dropdown—ensuring consistency across teams.
- Balanced Scorecard Integration: KPIs are aligned with strategic pillars, complete with targets, weightings, and score definitions—supporting strategic alignment and role clarity.
- Job Profile Templates: Role-specific KPI templates save time and ensure consistency across similar positions, helping managers and staff focus on what matters most.
- Multiple Scoring Options Choose from:
- Absolute Scorecard: Objective scoring based on actual results and pre-defined thresholds
- Numeric Scorecard: Subjective rating scale (e.g. 1–5), agreed between manager and individual
- Non-Numeric Scorecard: Descriptive ratings (e.g. Exceeded Expectations, Met Some, Not Met)
- Portfolio of Evidence: Staff can attach documents, photos, and notes to support their performance claims—creating a robust audit trail and enabling Training Needs Analysis.
- Manager’s Brief & Sign-Off: Managers can record discussions, review submissions, and sign off appraisals—ensuring clarity and closure at the end of each cycle.
- Appraisal Reports: A comprehensive PDF report is generated for each individual, with export options to Excel for HR records and strategic reviews.
- Mobile App Enabled: Fully accessible via mobile and tablet, allowing staff and managers to update and review appraisals from anywhere.