



## **Sample 360 Degree Appraisal Report - John**

This report sets out the feedback received from the perception survey. Please read it through carefully. You will probably need to read it a few times to get most value from it, and when reading it please keep an open mind.

Take pleasure from the positive points, and ask yourself what you could do to build on these strengths.

Some of the feedback may seem harsh and even hurtful. Try not to be defensive about such negative feedback, but instead ask yourself what it is about your behaviour that might have led people to form certain views and, from this, what you could do to lead them to change their perceptions. Being aware of people's perceptions puts you in a stronger position to develop. No-one is perfect and everyone needs to continue developing. The feedback is entirely for your own benefit and will help to identify priorities for your future development. Remember also that people are merely recording their perceptions. This does not mean that they are right and you are wrong (although sometimes perceptions are the only reality that matters).

Some assessments and comments may appear to be inconsistent with others. Consider why different people might have formed different perceptions of you.

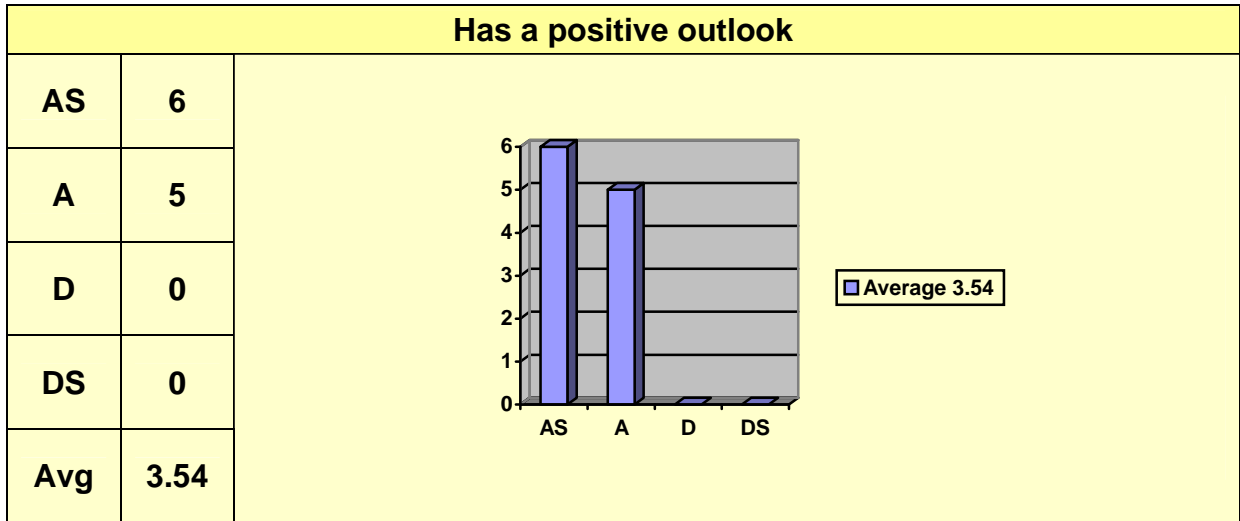
You may feel that you recognise the source of some responses. However, please do not under any circumstances acknowledge this with those concerned, or challenge them on any comments made, as they may conclude that confidentiality has been breached.

The table for each skill/attribute indicates the number of people giving each response. The average has been calculated by allocating scores to each response as follows:

- Agree strongly (AS) = 4
- Agree (A) = 3
- Disagree (D) = 2
- Disagree strongly (DS) = 1

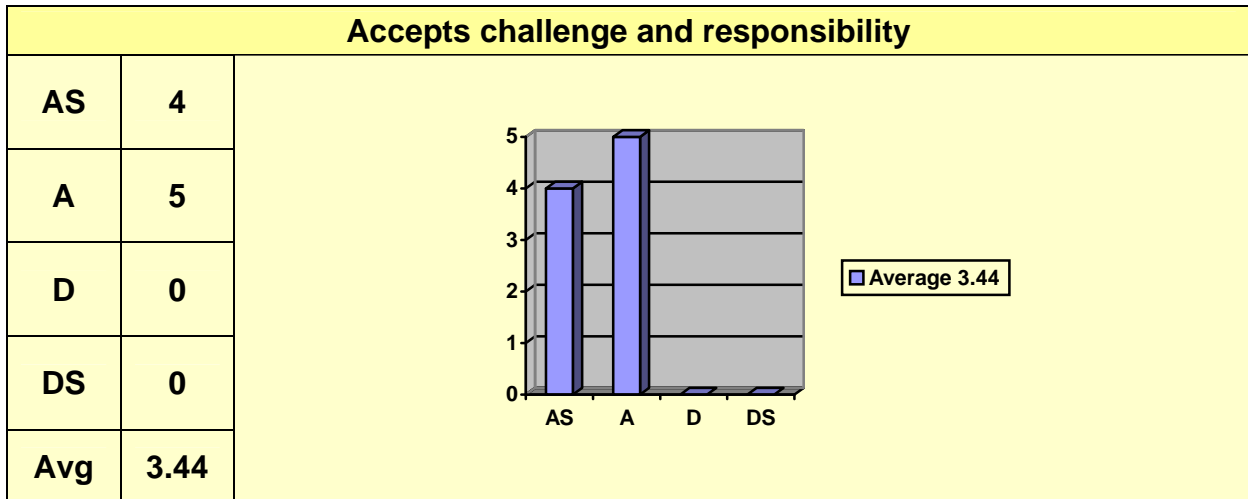
The comments received have been reproduced verbatim.

We will meet together to go over the feedback and to determine how to take best advantage from the appraisal.



**Comments**

- In my dealings with John he has demonstrated a positive approach.
- John presents a positive outlook in seeking to achieve his objectives.
- Always very professional, good manner and approach with clients.
- Although John has only been with the firm for a short period, he clearly demonstrates a positive attitude in all aspects of his work.
- Radiates enthusiasm and optimism.
- Comfortable person to work with. Sincere and always positive.
- Always appears positive.
- John is always bright and nonchalant.

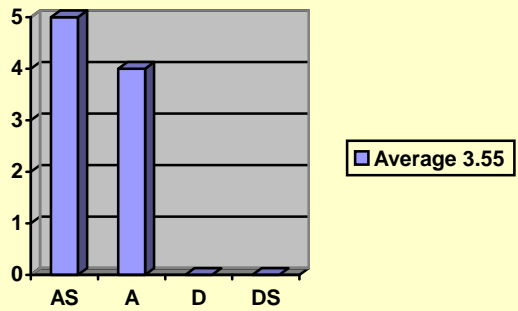


**Comments**

- John thrives on responsibility and is always prepared to accept new challenges.
- John comes across as a 'can do' person.
- Has readily accepted work outside his competencies/job spec.
- John is always keen to take the initiative.
- John has taken a lead role in ensuring work is done.
- (Agree strongly) Particularly wants to develop and move the office forward.

**Works hard and enthusiastically**

<b>AS</b>	<b>5</b>
<b>A</b>	<b>4</b>
<b>D</b>	<b>0</b>
<b>DS</b>	<b>0</b>
<b>Avg</b>	<b>3.55</b>

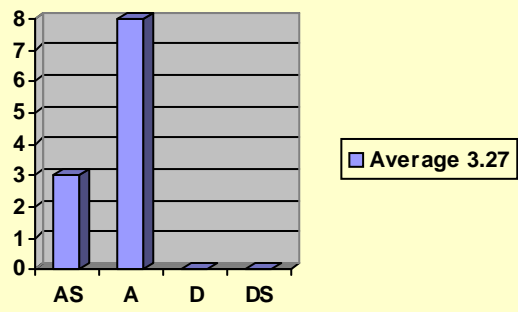


**Comments**

- An excellent work ethic. Extremely enthusiastic client work and practice development opportunities.
- John appears enthusiastic in his approach.
- John's infectious enthusiasm is a key strength.
- In clients case John worked at all hours, including weekends. Always prepared to help at any time.
- Very much so.
- John is very diligent in his approach.
- Driven at times.

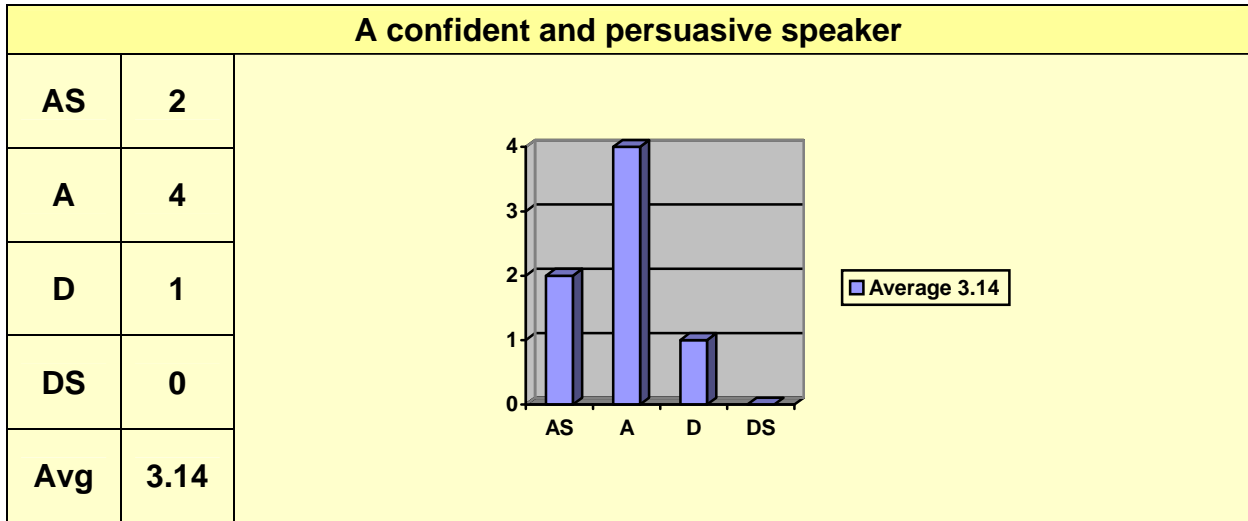
**Expresses views clearly**

<b>AS</b>	<b>3</b>
<b>A</b>	<b>8</b>
<b>D</b>	<b>0</b>
<b>DS</b>	<b>0</b>
<b>Avg</b>	<b>3.27</b>



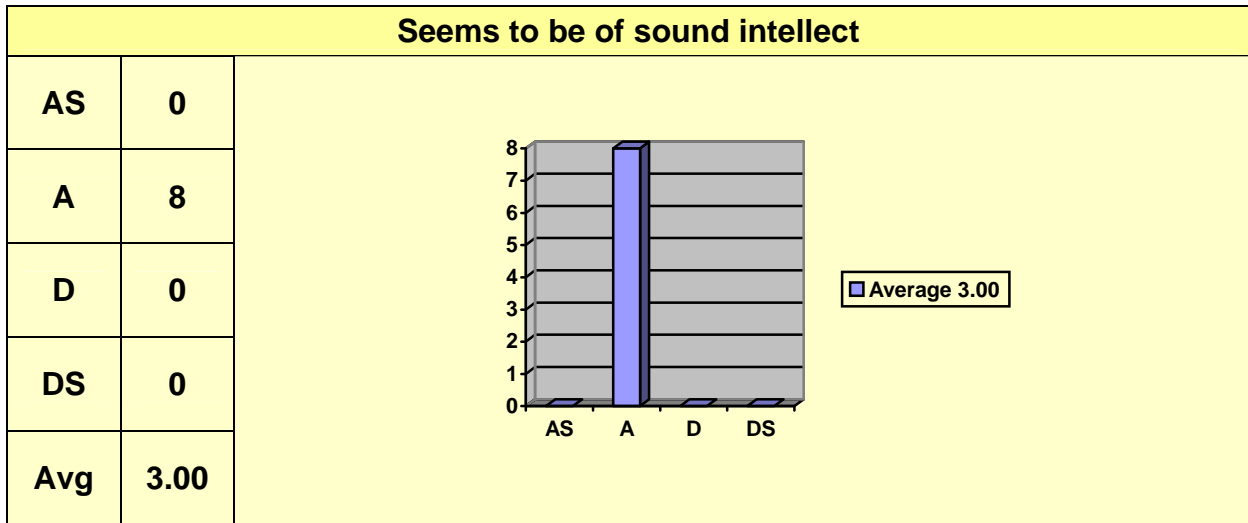
**Comments**

- Expresses views clearly without getting too technical.
- Focuses – doesn't waste time. Explains things simply and gets to the point.
- John is able to express himself clearly in a written form and verbally.
- Comes across very well. Never over-complicates matters.
- I have attended several client meetings with John. On each occasion he has been articulate and well received.
- Good at ensuring that staff understand what is required of them and also informing them if they have under-performed.



**Comments**

- John comes across as confident and can be persuasive.
- Great in client meetings.
- Makes his point clearly and concisely.
- In meetings John has performed well. Skills of persuasion evident from meeting he attended on my behalf.

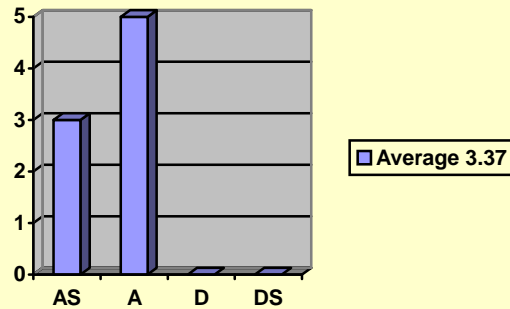


**Comments**

- Demonstrates this clearly in his technical work.
- Is highly competent and has strong business sense.
- Demonstrates this constantly.
- John has no problems here.
- Nothing too challenging delegated to John but has clearly demonstrated ability to assimilate fact and market a brief.

**Is capable of being called upon to represent the office in a particular field**

<b>AS</b>	<b>3</b>
<b>A</b>	<b>5</b>
<b>D</b>	<b>0</b>
<b>DS</b>	<b>0</b>
<b>Avg</b>	<b>3.37</b>

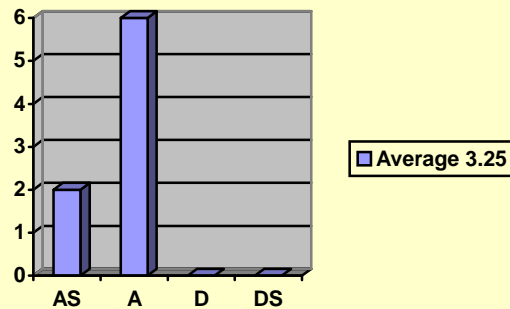


**Comments**

- Without question. Already a recognised 'player' in his field and well qualified to represent the firm.
- I would not hesitate to call upon John to represent the firm.
- John can represent the firm well in his sector.
- A leader who stands up well in his particular field.
- Copes well under pressure.

**Moderates technical knowledge with common sense**

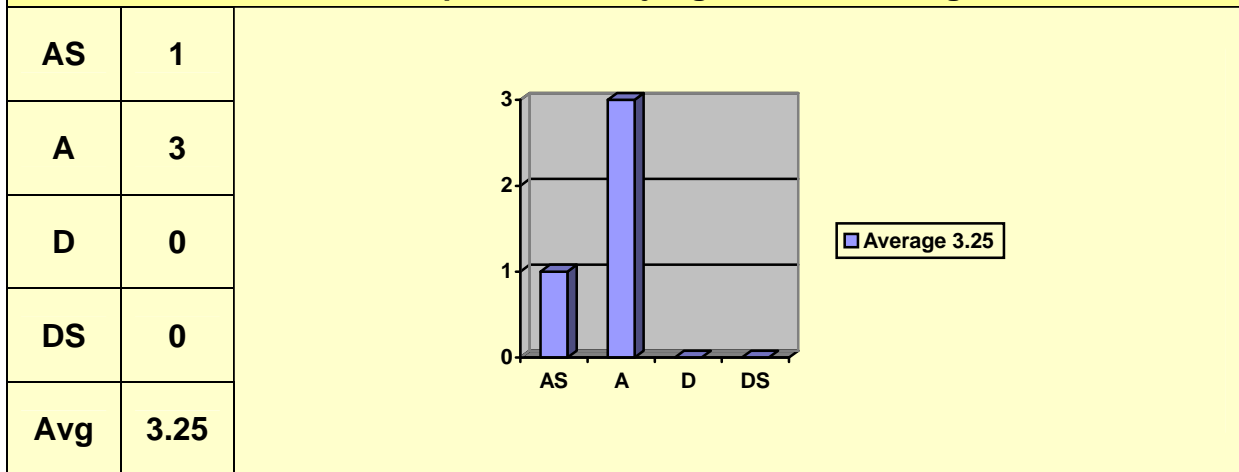
<b>AS</b>	<b>2</b>
<b>A</b>	<b>6</b>
<b>D</b>	<b>0</b>
<b>DS</b>	<b>0</b>
<b>Avg</b>	<b>3.25</b>



**Comments**

- John would never take risks and is always prepared to discuss with others any areas where there might be concern.
- Looks for pragmatic solutions.
- Uses a number of different tax advisers. John is simply the best.
- I would suspect this is the case although I do have direct evidence of it. (sic)
- Untested, but nothing I have seen indicates otherwise.

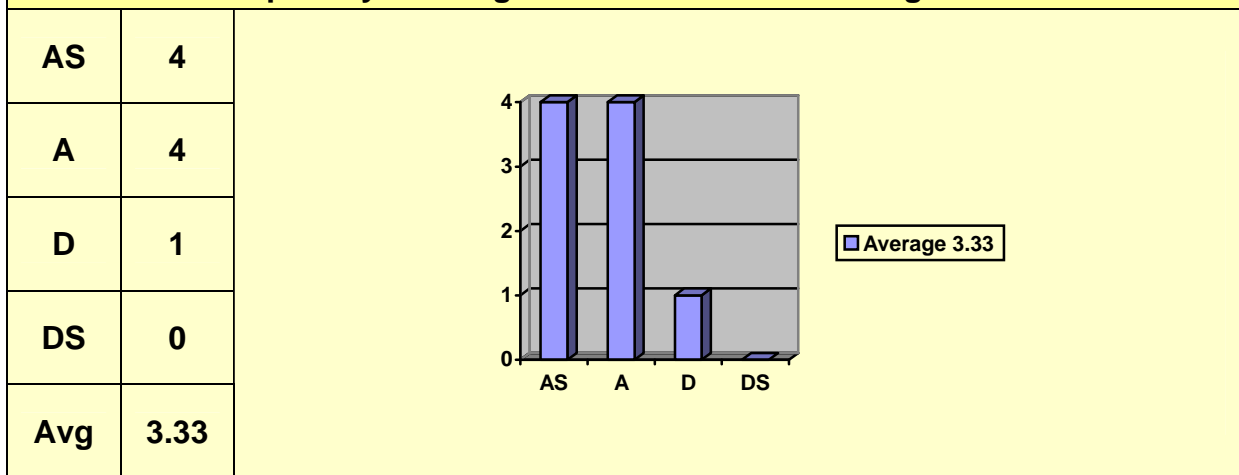
**Seems firm on matters of professional judgement, including risk and ethics**



**Comments**

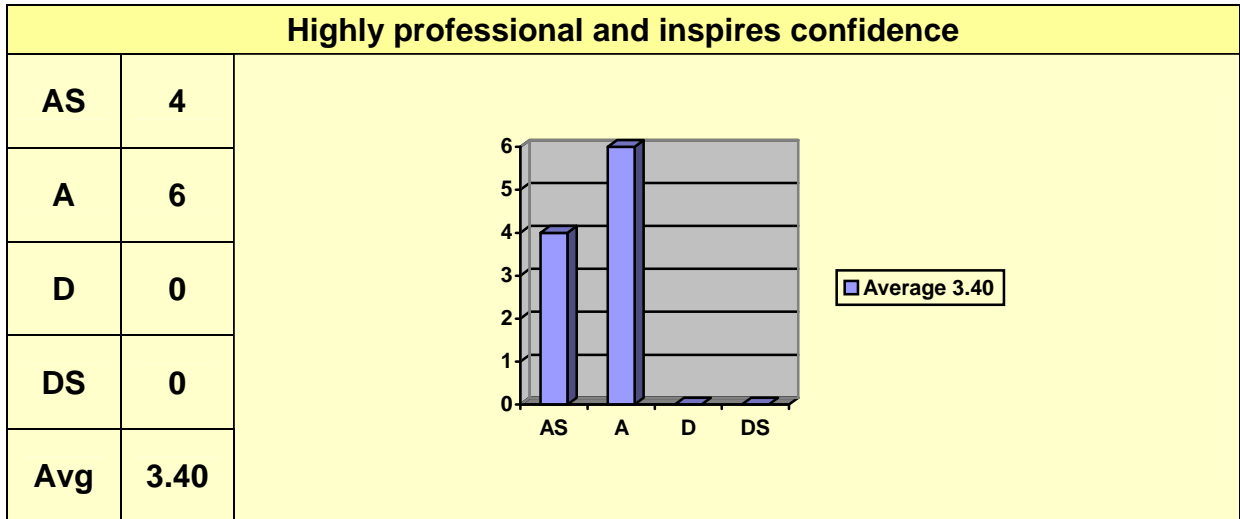
- An essential requirement given the nature of the work he is involved with. Also demonstrated by the fact that an ethical issue also led to his decision to leave his previous firm.
- Untested, but nothing I have seen indicates otherwise.
- Always considers the firm's perspective.
- Looks for guidance on points, which is a good awareness of risk.

**Capability of being used as a useful sounding board**



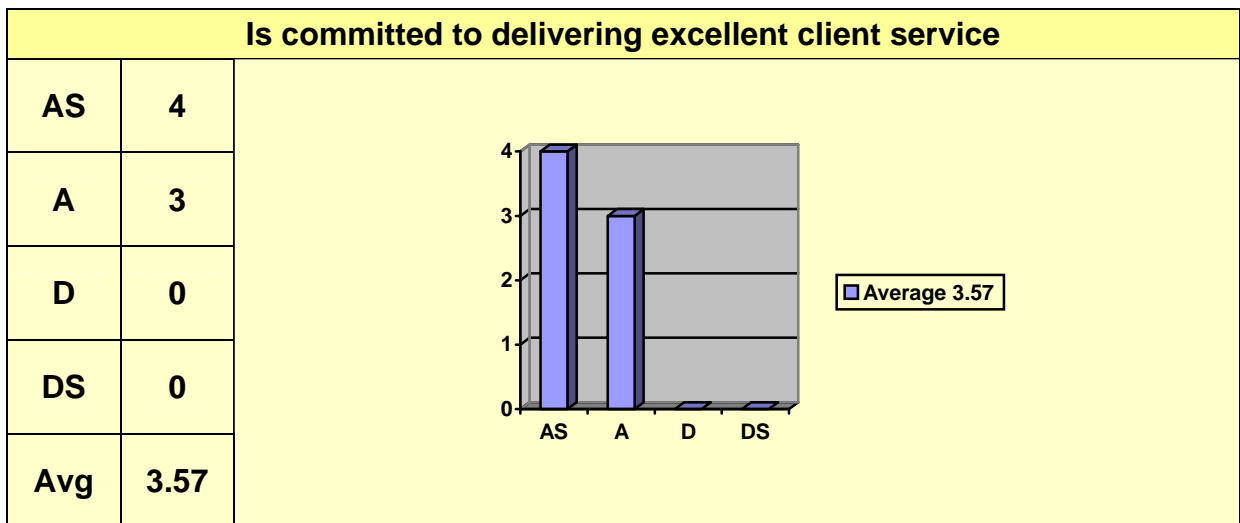
**Comments**

- John displays a confidence which does encourage this.
- Always available to discuss issues.
- Untested, but nothing I have seen indicates otherwise.
- John makes himself available to discuss issues as they arise and to agree the way forward.
- Most definitely in his area of expertise, but also willing to give his views on non specialist related matters.
- Is a good listener and clarifies difficult matters well.



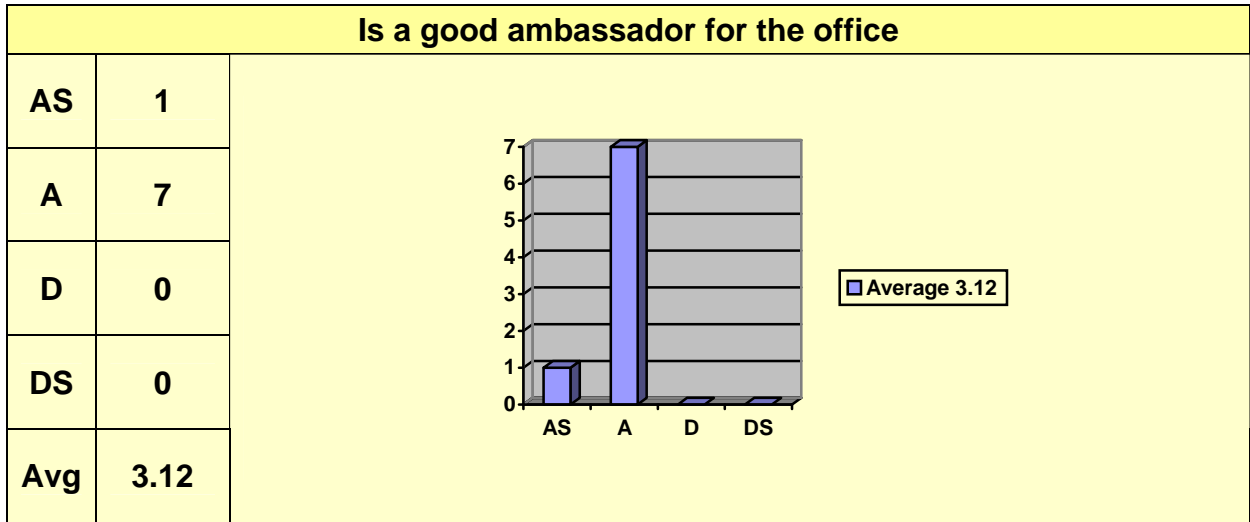
**Comments**

- Best support and overall adviser I have had.
- Has great presence.
- There can be no question about John's professional attitude and in a difficult (and sometimes stressful) area of work, clearly inspires confidence in clients and colleagues.
- Goes without saying.



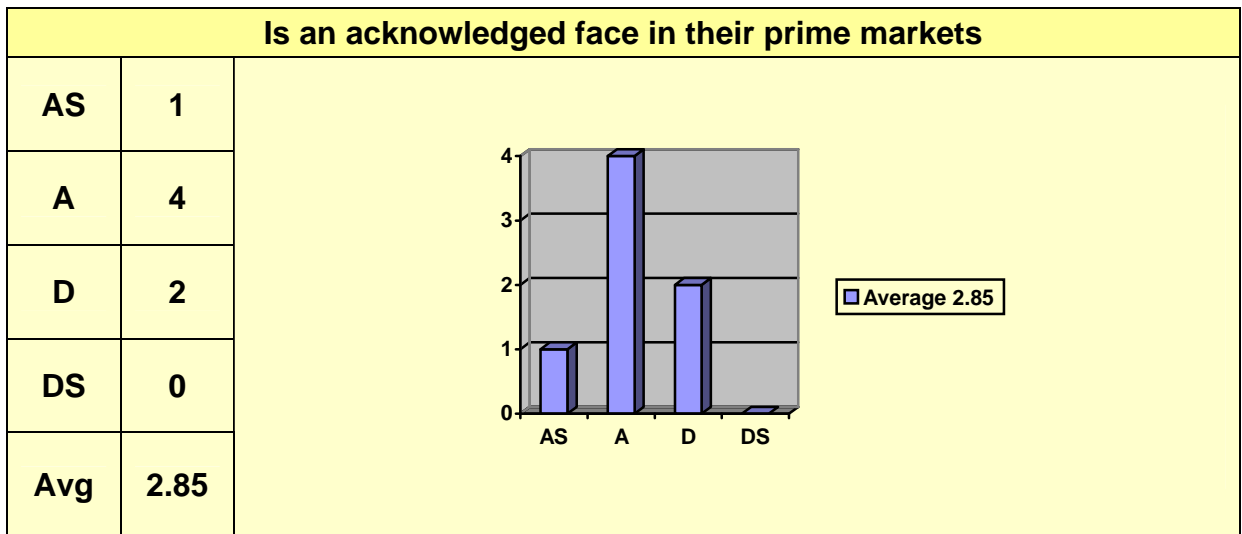
**Comments**

- Clients always come first with John. In a difficult area of work, John makes sure that clients are aware of all aspects of an investigation and protects them from the pressures this can cause.
- 100%. Clients very much like John's approach. A good listener.
- Very highly motivated and clearly driven by a strong desire to deliver an excellent service.



**Comments**

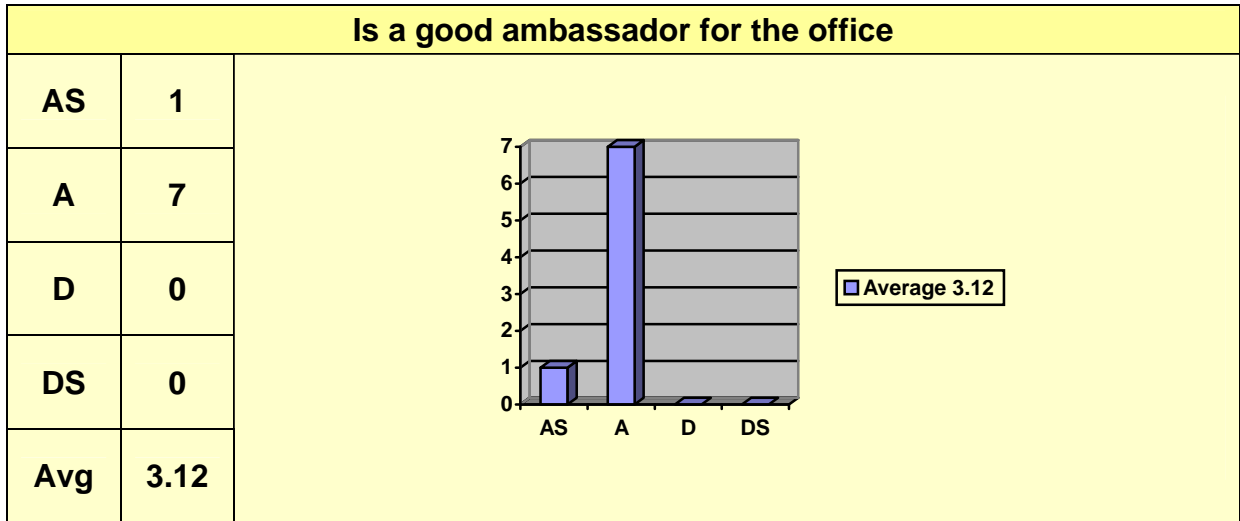
- John has only been with the firm for a short period and is already seen by staff and partners as an ambassador in this area. I have only scored as 'agree' because of the short period he has been with the firm. I have no doubt that this will quickly become 'agree strongly'.
- Promotes and represents the firm constantly.
- One of the best.



**Comments**

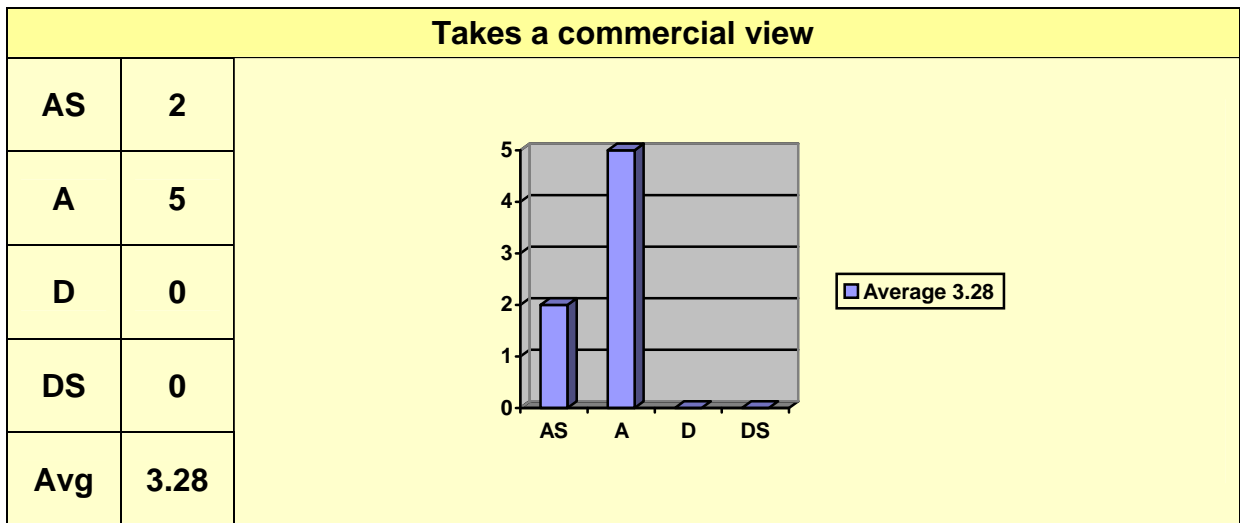
- Has a recognised profile in focussed markets.
- John has a reputation in his area of expertise and seems to have a good network of contacts, which he is already introducing to the firm.
- Well developed both internally and externally.
- Definitely making his presence felt.





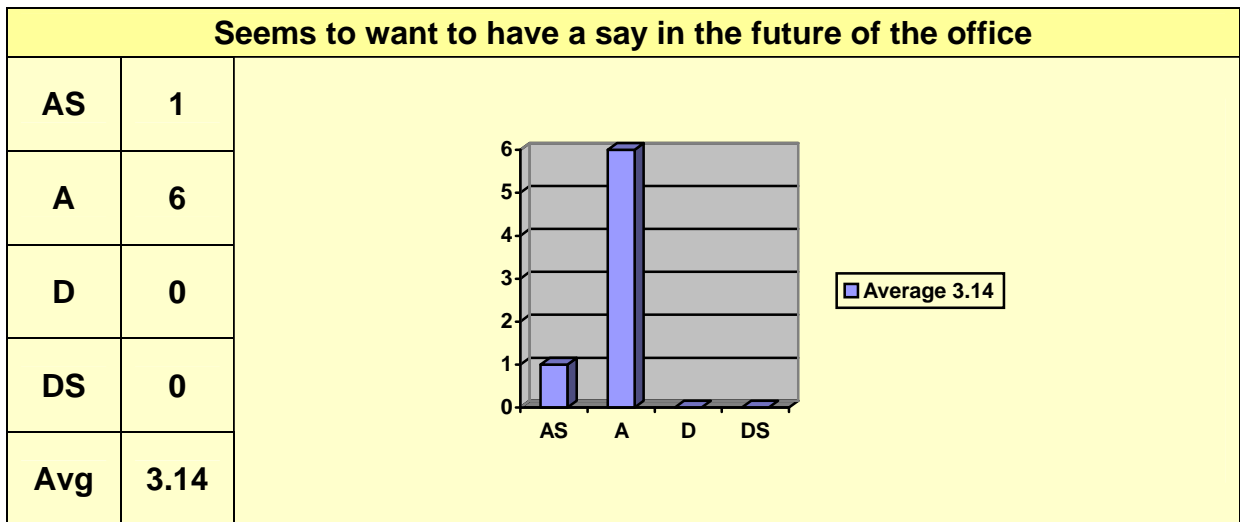
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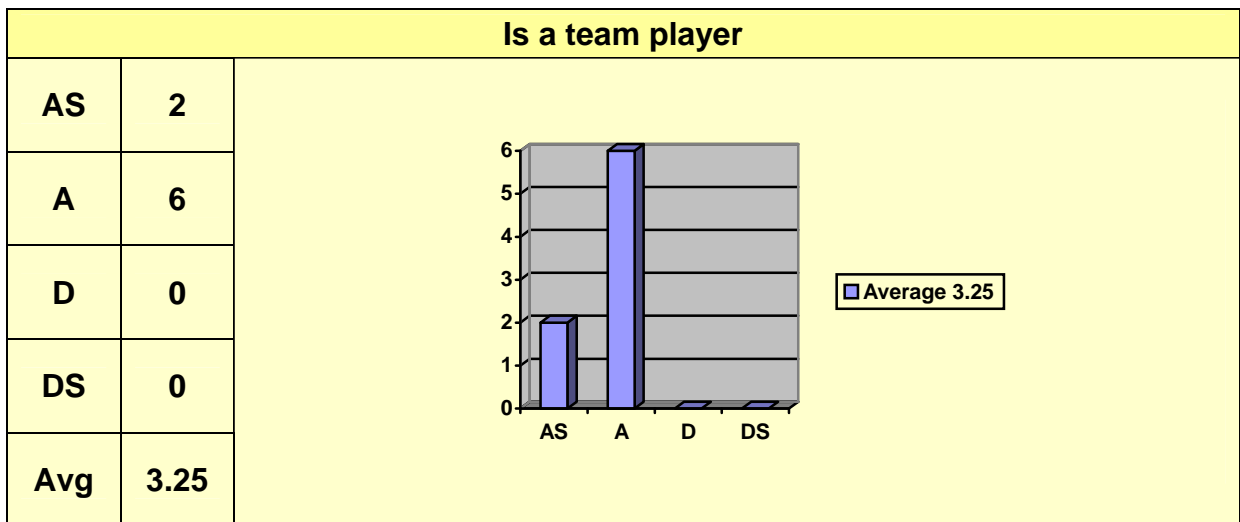
**Comments**

- Always looking to the future. Calls regularly with updates etc.
- Very commercial. In some instances persuaded client to continue with arguments as there was still good commercial sense which client had not identified.
- Certainly at a technical level. And his past experience as a partner reflects his commercial approach to winning new clients and ensuring maximum recoverability.
- Always takes a commercial and strategic view.



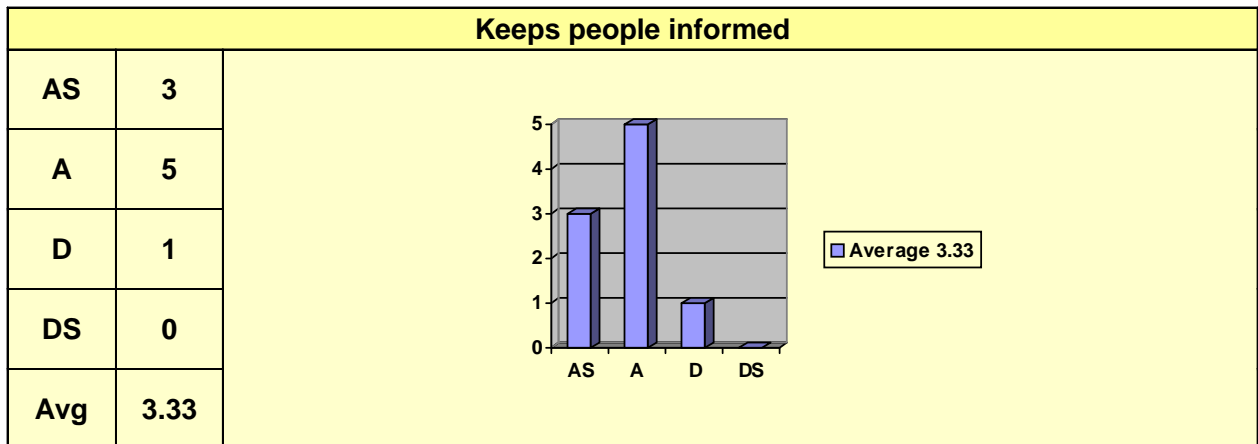
**Comments**

- John's participation in the development programme demonstrates this.
- John's vision for the office has always been long term and therefore he has spotted problems on the horizon and dealt with them effectively.
- Definitely wants a say in the future of the office.
- Wants a say and states clearly what he sees as the way forward.

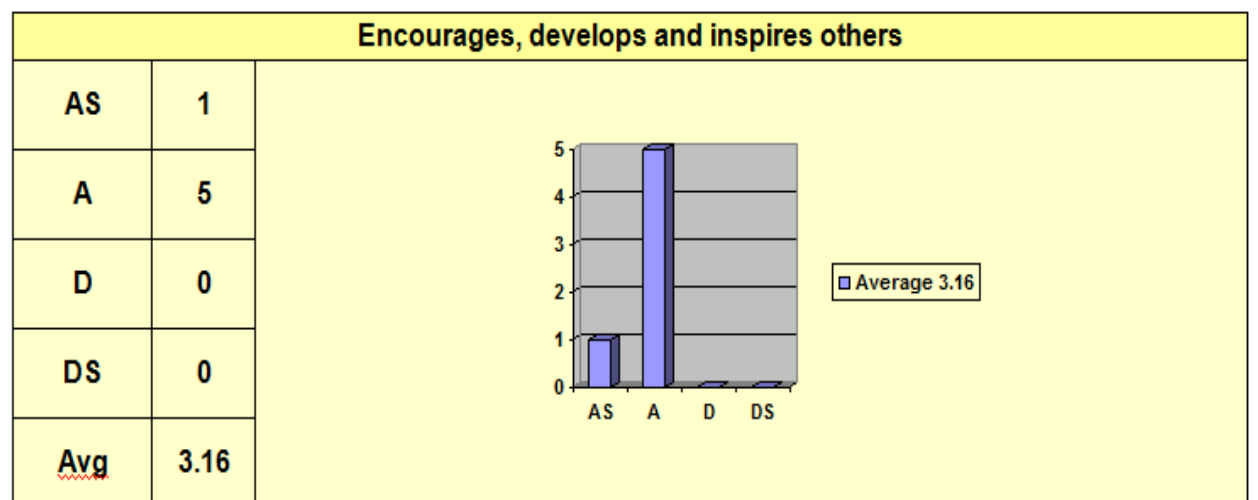


**Comments**

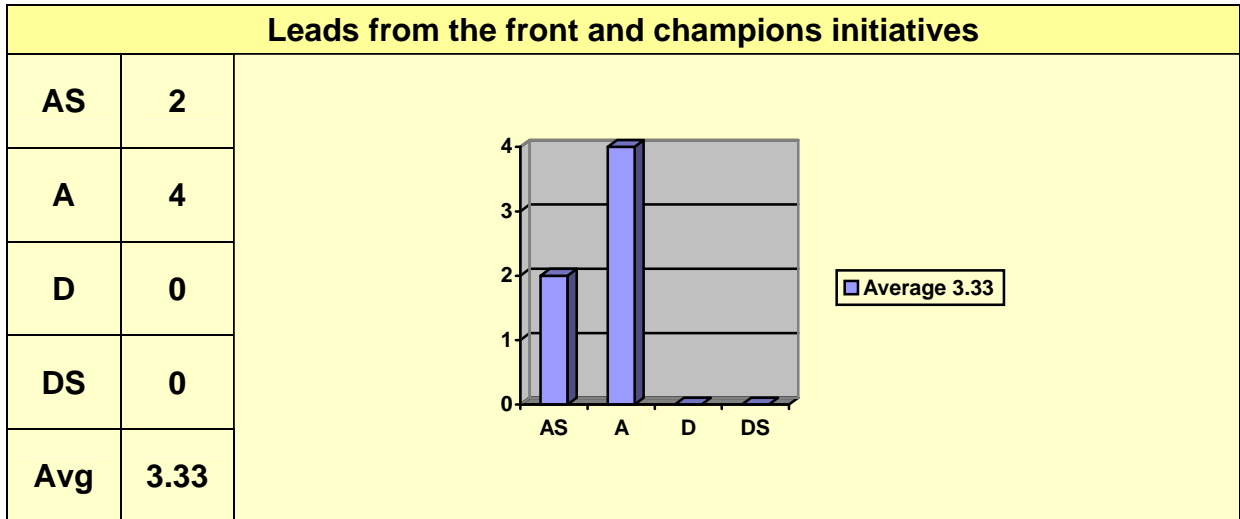
- Although John does not have his own team around him as yet, he very much relishes the contact with others and is seen as being part of the team (and after only 12 months).
- I have worked with John in a team context found him to be an excellent team player.
- Agree, but sometimes it doesn't appear as if John is listening to other points of view.
- John is a good team player.
- Does not always think of the impact of others when driving his agenda. Possibly a cultural thing but often tries to get individuals to take meetings without adequately explaining the rationale in advance.



- Comments**
- Absolutely, John always provides regular updates on all matters.
  - Clearly evident from client work John has been involved with on my behalf.
  - Always keeps them informed of developments on client related matters.
  - John is good at making sure that people know what is going on.
  - My experience is that John is keen to ensure that he shares relevant information.

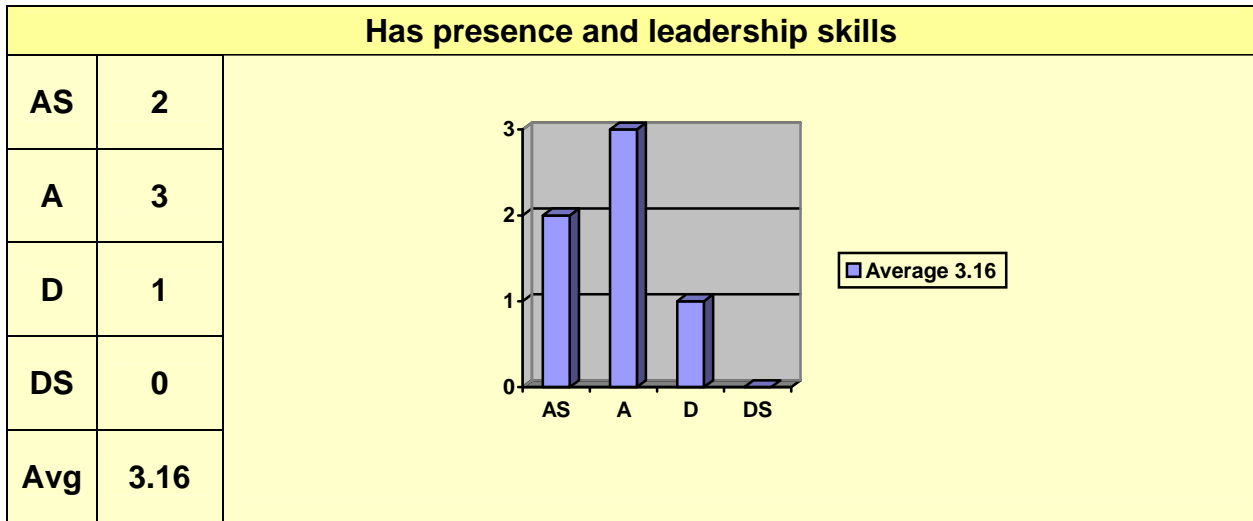


- Comments**
- John certainly encourages but I do not yet know if he can be said to 'develop' or 'inspire'.
  - I think John is an inspiration to others. Difficult to measure as he doesn't have others working for him directly at present but you can see from his approach and conversations with others, that he most certainly has their respect (partners and staff).
  - Limited personal evidence to support these scores but all indications suggest John's leadership qualities reflect his overall personal strengths.



**Comments**

- John's experience as a partner with other firms clearly shines through. He is always prepared to 'roll his sleeves up' and take the lead.
- Seems to, but not sure of the effectiveness of his efforts.
- John has already demonstrated this in his desire to launch the newsletter.
- Limited personal evidence to support these scores but all indications suggest John's leadership qualities reflect his overall personal strengths.



**Comments**

- This can clearly be seen when John is talking to groups of staff and partners. He has an 'aura' of leadership about him.
- Presence of sorts but not sure about leadership skills.
- Limited personal evidence to support these scores but all indications suggest John's leadership qualities reflect his overall personal strengths.

## Additional comments

- John is a very likeable and professional addition to the firm. I believe he has the right qualities to progress further.
- John has been a most welcome addition to the firm. He is working extremely hard to develop tax investigations and is highly skilled both technically and in the area of practice development. He is already known to all of the regional offices and has created a number of opportunities in London and in the regions. His past experience as a partner clearly shines through. John is very easy to get on with and is respected by staff. He manages his clients very well and they clearly respect him. This is clearly demonstrated by the fact that a number of clients 'followed' John to this firm when he left his previous firm.
- Since joining, John has appeared enthusiastic and keen to develop opportunities.
- I would have no hesitation on using John on client related matters in the future. Clients enjoy working with him and find him a good listener in what can be very difficult and stressful circumstances. John takes the pressure off the client.
- I have been in business for over 40 years and in that time had many professional advisers. John is quite simply the best. Very affordable and highly recommended.
- I have worked with John on a number of my clients. He has performed well on all occasions and has impressed me with his professional skills and great attitude. He is a pleasure to work with. Feedback from clients has been positive – we were positively impressed by some work he did for (Major corporation). John is an asset to the firm.
- My experience is that John is very keen and eager to grow both his own business area and the firm as a whole. I would say that he might have a tendency to be a little impetuous and needs to ensure that what he is proposing and how it is delivered will not conflict with other areas of the business and their own business initiatives.
- John has made a strong contribution to the firm.
- I have found John to be an excellent addition to the team, who maintains a cool head when faced with challenging situations. He is also pro-active in disseminating information around the firm.