

My Performance Scorecard FY16

Employee name:		Division:	NAB FP
Role:	Senior Financial Planner (Business)	People Leader name:	

Short-Term Value

FINANCIAL	Financial Metric	Measure	Target Met Expectations	Target Exceeded Expectations	Full Year Outcome
		Increase the number of customers protected through a Risk solution	Number of Lives Insured as measured by policy completions via MLC or non MLC (including policies completed by a BPS or SFP1 that were referred by a SFP as recorded in NABView)	Lives Insured (SFP2) and Lives Insured (SFP1)	Lives Insured (SFP2) and Lives Insured (SFP1)
	Initial Advice & Implementation Fees charged	Initial Advice & Implementation Fees			

SHAREHOLDER RETURNS	Metric	Measure	Target Met Expectations	Target Exceeded Expectations	Full Year Outcome
		Improve customer engagement and support the wider enterprise by identifying new opportunities	Referrals to other roles within NABFP including Corporate Super, MLC Direct, Business Banking, Personal Banking & Specialised Sales	referrals per annum as measured via NABView	referrals per annum as measured via NABView
	Risk Management	1) Performing and adhering to policies, processes and procedures, and meeting quality measures pertinent to role. 2) Identification and escalation of events / losses / breaches as incurred.	- Adherence to Policy, Process, and Procedures and achievement of target quality measures. - Advice Compliance Risk rating of B, or where C rating - 100% of remediation inclusive of no further compliance assessments to prevent movement to B.	People Leader assessment. - Adherence to Policy, Process, and Procedures and achievement of target quality measures. - Proactively raises events, issues or concerns - Advice Compliance Risk rating of A	

FY16 KEY DELIVERABLES	Deliverable	Measure	Target Met Expectations	Target Exceeded Expectations	Full Year Outcome
		Wider Wealth Strategy	Improve the experience and engagement levels of our customers by accessing the full range of solutions available through NIIS, PIC, JB Were, NAB Trade and NextRural	completed customer transactions (excluding Hybrid transactions)	completed customer transactions (excluding Hybrid transactions)
	Consistent execution of our operational and customer management disciplines	Improving our speed to market and the overall customer experience by utilising the tools, processes and systems available to us including Miller Heiman, NABView, Xplan, Paraplanning and CSO & CSA support.	people leader assessment. - Consistent weekly recording of activities and updating of opportunities within NABView - Demonstrated use of Miller Heiman philosophies in customer and banker interactions - Feedback received from CSO's, CSA's and Paraplanning regarding the use of Xplan and quality of requests	As per Target Met Expectations with: - Minimal expired & stalled opportunities evident in NABView throughout the year - NABView funnel reflects all customer opportunities and can be used to adequately project 30-90 day revenue forecasts - Demonstrated use of Green and Blue sheets and Funnel Scorecard templates within NABView	

Long-Term Value

ENTERPRISE KPI	KPI	Measure	Target Met Expectations	Target Exceeded Expectations	Full Year Outcome
		Net Promotor Score - increase the level of advocacy within our existing customers	Increase the numbers of referrals received from our existing customers to potential new wealth customers	referrals per annum from existing NAB FP customers to potential customers resulting in a 1st appointment	referrals per annum from existing NAB FP customers to potential customers resulting in a 1st appointment
	Actively demonstrate strong performance and fulfil own potential and the potential of the team	Actively manage own performance, development and career and mentor, coach and guide others within the team	Evidence of managing own performance, development and career and at times coaching, assisting or guiding others within the team	As per Target Met Expectations with CE points completed quarterly on a pro-rata basis, taking an active role in the coaching and guidance of team members and demonstrating moving own development and capability throughout the year	

Compliance Gateway Outcome:	
Overall Performance Outcome:	
Living Our Values Assessment:	