

My Performance Scorecard FY16

Employee name:
 Role:
 Division:
 People Leader name:

Short-Term Value		Q1 Feedback	Q2 Feedback	Q3 Feedback	Full Year Outcome
FINANCIAL	<p>Financial Metric</p> <p>Measure: Provide quality advice and collect new revenue for that advice.</p> <p>Target Met Expectations: 100% of target</p> <p>Target Exceeded Expectations: 110%+ of target</p> <p>Improve penetration of Wealth solutions into the NAB customer base</p> <p>Lives Insured evidence by actively protecting the lives of NAB customers</p> <p>Lives Protected per annum - counted at Completion</p> <p>110%+ of target, Lives Insured</p>				
SHAREHOLDER RETURNS	<p>Metric</p> <p>Measure: Execute 4Dx & Inspire Leadership Weekly participation and facilitation of Sales Focus Sessions, Partnership Meetings, Support for BA's around NMP & Calling Days to generate referral opportunities</p> <p>Target Met Expectations: 100% First Appointment Target Leading to Pieces of Advice at the Right Price</p> <p>Target Exceeded Expectations: 110% First Appointment Target Leading to Pieces of Advice at the Right Price</p>				
FY16 KEY DELIVERABLES	<p>Deliverable</p> <p>Measure: Increase Customer Satisfaction and Support the enterprise by providing referrals to NAB Group Partners</p> <p>Customer Satisfaction & Engagement</p> <p># of Referrals provided to Retail Bank, SB & MLC Direct or other institutional partners</p> <p>Risk Management</p> <p>1) Advice Compliance Risk Rating 2) Performing and adhering to policies, processes and procedures, and meeting quality measures pertinent to role. 3) Identification and escalation of events / losses / breaches as incurred.</p> <p>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</p>				
ENTERPRISE KPI	<p>KPI</p> <p>Measure: Actively demonstrate strong performance, fulfil own potential and contribute to the organisational capability</p> <p>Actively manage own performance, development and career, and participate/engage in coaching, mentoring and guidance from others</p> <p>Contribute to NAB FP reputation within Wealth Advice, Community and NAB Group</p> <p>Effectively use 2 volunteer days to make a difference in the community and/or actively garner support for charity / community in the workplace</p>				

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