



Individual Training & Development Performance Plan

The staff member and supervisor meet to reach agreement on training and development goals for the forthcoming period.

Training and Development Goals	Strategies	Resources Required	Outcomes/Comments
<h1>SAMPLE</h1>			

Agreement about contents of the Individual Development Plan:

Please sign & print name:

Staff Member: _____ **Date:** _____

Signature _____

Supervisor: _____ **Date:** _____

Signature

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Job Description – Partner

Position: Manager
Location: Office based / clients' premises as required
Job Status: Full time
Responsible to: Board of Directors
Responsible for: Management team
Date: 9th February 2011

Job summary

To lead the team and build the strategy which will increase EBIT and value of the business.

Duties and Responsibilities

Clients

- For the top 25 clients to be not only satisfied with the service provided but delighted
- Anticipate client needs and search for ways to improve client service
- Ensure that any client contact is planned to ensure the outcome is achieved

Financial

- Ensure the team hit their KPI (lead indicators) to ensure we the lag indicators (results)

Strategy

- Build awesome work practices
- Build new divisions for the business that will drive the higher average fee per client
- Manage risk in business, including key team members
- Build marketing strategy to support the sales strategy

Team

- Build an awesome team
- Develop a team a mentoring program
- Support team members and promote a positive team environment in line with the Code of Conduct
- Set a quarterly team

Relationships

- Acts as a mentor to lower level Accountants
- Help with the training and development of lower level Accountants
- Maintain a positive attitude towards all team members at all times



Job Description – Intermediate Accountant

Position: Intermediate Accountant
Location: Office based / clients' premises as required
Job Status: Full time
Responsible to: Manager
Date: February 9, 2011

Job summary

Building on the existing accounting knowledge to work in the business services team to prepare tax management accounting and have responsibility for a portfolio of clients.

Duties and Responsibilities

Client

- For all clients to be not only satisfied with the service provided but delighted
- Anticipate client needs and search for ways to improve client service
- Ensure that any client contact is planned and discussed with your Manager or Partner to ensure the desired outcome is achieved

Financial

- Meet your weekly capacity target
- Meet your weekly billing target
- Use resources in a responsible and efficient manner
- Strict adherence to the firm's client confidentiality policies

Process

- Provide on tax management accounting to a group of clients
- Move towards preparing company, small business and individual tax returns

Relationships

- Being open to mentoring by higher level accountants and management
- Participate in all staff training and development
- Maintain a positive attitude towards all team members at all times

Experience & Qualifications

- TAFE Qualified
- Minimum 3 years' experience

Skills, Abilities, and Knowledge

- Well developed interpersonal, oral and written communication skills.
- Ability to self review all work prior to manager review



INTERVIEW QUESTIONS

Name	
Date of Interview	
Position Applied for	
Time Meeting Started	
Time Meeting Concluded	
Interviewed By	

1. Tell us a little bit about yourself
2. What are your Strengths?
SAMPLE
3. What are your Weaknesses?
4. How do you deal with constant demand & working under pressure?



Performance Appraisal

Name		Department		Review Period	
Job Title: Under Graduate Accountant		Date Joined		From	To
Date Appointed to Role		Date of discussion			
Supervisor		Partner / Director			
Key Performance Indicators (KPIs)					
KPI	Performance Measure	Performance Target	Comments	Rating	
Client Services	Client contact	Regular and timely communication to follow up information needs and clarification of issues		E.g. a scale of 1-5 - Optional	
	Service delivery	Job turnaround days = 20 days Escalation of client complaints and issues to the intermediate accountant within 24 hours		1 = role model 2 = consistently meets and exceeds expectations 3 = meets and at times exceeds expectations 4 = Requires development and at times meets expectations 5 = Unsatisfactory performance	
Corporate / Financial Performance	Capacity and Targets	Meeting weekly capacity and budget targets Meeting monthly billing targets			
	WIP Management	Maintain WIP levels in line with firm targets and ensure aged WIP is maintained at minimum levels.			
	Profitability	Revenue per FTE = \$125,000 Revenue target = 3 times multiple of salary Write offs <= 4%			
Operations	Productivity	Producers > 70% firm wide 100% of chargeable time			
	Workflow	Weekly Capacity = Actual time on clock Contribute to weekly workflow meetings Job turnaround time - Job in to job start Job turnaround time - job start to job out			
	Reporting	Report to Intermediate Accountant weekly the progress on allocated work Report on bottlenecks and incomplete work on a weekly basis Report any productivity / billing target issues weekly			
	Systems & Procedures	All systems and procedures executed with 100% accuracy and quality Tasks checked off weekly			
	Performance, Training & development	Take ownership of agreed career development plan and drive achievement of goals			
People Capital					
Skills and Behaviours	Description	Comments		Rating	
Problem Solving	Identifying and escalating business challenges and recommending possible solutions			E.g. Outstanding, Good, Acceptable	
Planning & organising	Taking ownership for the efficient planning and delivery of all allocated work for self			Marginal, Unsatisfactory or A, B or C rating	
Client Focus Approach	Demonstrate commitment to our customers through our proactive engagement and follow up of requests				
Written & verbal Communication skills	Excellent verbal and written communication skills at a level that represents the firm in the most professional manner in the market				
Decision Making	Prepared to back judgement and make decisions within agreed level of authority				
Motivation	Demonstrate personal drive, enthusiasm and commitment to the goals and values of the business				
Results Focus	Committed to exceeding individual and team targets				
Team Focus	Contribute best efforts in achieving team results				
Development Area	Development Activities	When	Status / Update		
1. e.g. Leadership 2. 3.	Leadership training course	next three months	TBA		
Top 3 Achievements	Top 3 Challenges		Top 3 Priorities for next period		
1. 2. 3.	1. 2. 3.		1. 2. 3.		
Supervisor / Manager Name		Signature		Date	
Comments					
Partner / Director Name		Signature		Date	
Comments					
Employee Name		Signature		Date	
Comments					