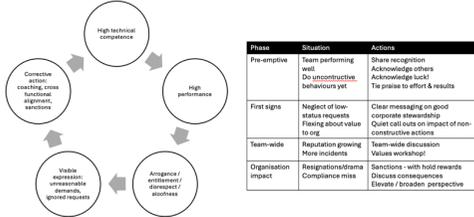
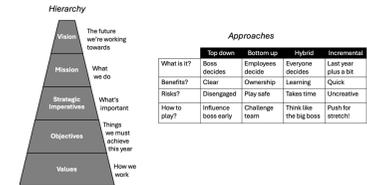


# The Performance Cycle

## Corrective positioning



## Goal setting



## Succession Plan

MADE-UP EXAMPLE - SUCCESSION PLAN

	Managing Director	Commercial Director	Finance Director	HR Director	Legal Director
Incumbent	Adam Spillane	Christina Dale	Edward Egan	Quentin Young	Spencer Jones
Ready Now	Christina Dale Board plan	Kath Longpo	None	None	Maria Nassis
Ready in 1 year	None	None	Oliver Stubbins Head of Credit	None	None
Ready in 2 years	Kath Longpo Exam Dir	None	None	None	Victor Tishon Group Chair
Ready in 5 years	None	Sonya Stamboulis Trust for Debt	William Moore Senior vice	Aline Mukama HR Lead	None
Emergency	Edward Egan	Kath Longpo	Oliver Stubbins	External	Maria Nassis

## Development Plan

MADE-UP EXAMPLE - A SIMPLE INDIVIDUAL DEVELOPMENT PLAN

1. Employee Name	Aline Mukama	2. Current Position	HR Bus Partner, Commercial Banking
3. Short Range Career Goals (1-2 years) Specify positions	Manager HRBP team	4. Long Range Career Goals (3+ years) Specify positions	Director People & Culture
<b>E. Developmental Objectives</b>			
Knowledge, skills, abilities to develop	Supporting Developmental Activities, Assignments, Projects, Responsibilities	Supporting External Training Courses, Workshops	Other Activities Reading, Self Development
A. Organisational Development	Complete recruitment of new commercial teams for Trade Finance, Agricultural Finance and Heavy Sector Finance. Deadline: End 2028	None - on the job training, with mentorship from commercial leader	None
B. Understanding of complete HR function	Participate in HR Leadership Team where appropriate. Take on assignments in other functions (e.g. comp and ben analysis) if opportunities arise.	Complete the HRCA program (20-week executive learning experience focused on key themes and competencies in HR)	None
C. Team Leadership	Identify cross-functional task teams that Aline could lead. For example, on streamlining or reducing processes	None	Suggest reading: The Art of Possibility by Rosamund Stone Zander

Goal Setting

Team positioning

Progress Reviews

Recognition

## Quarterly Scorecards

MADE-UP EXAMPLE - Individual Quarterly Scorecard Template

Employee Name	Position	Quarter	Q1	Year	2026
Aline Mukama	HR Bus Partner, Commercial Banking	Team/Dept	HR Department		
<b>How to Complete This Scorecard:</b> Choose Objectives that describe what you want to achieve this quarter using SMART outcome statements (specific, measurable, achievable, relevant, and time-bound). For each objective, select 3-5 Key Results that define how success will be measured, set targets & deadline upfront, and complete achieved & comments at the end of the quarter. Identify a personal Development Goal for the quarter that describes the leadership skill you want to learn, for example becoming more curious about others' ideas or increasing engagement & collaboration.					
<b>Objective 1. Acquire and retain talent to keep the Commercial Banking Department at Full Complement in Q1</b>					
Key results 1.1. Fill current three vacancies					
1.2. Recruit turnover under 5 percent					
1.3.					
<b>Objective 2. Ensure high engagement from staff in Q1</b>					
Key results 2.1. Achieve 80 percent engagement survey score					
2.2. Respond to grievances within 24 hours					
2.3. Complete monthly team-building activities					
<b>Objective 3. Build strong foundation for training, development and successful planning in Q1</b>					
Key results 3.1. All staff have development plans					
3.2. Team building complete development discussions					
3.3. Succession planning workshop completed					
Development Goal for Quarter: Stay curious about other people's perspectives and learn to ask for and receive help when needed.					

## Marked up Scorecard

MADE-UP EXAMPLE - Individual Quarterly Scorecard Template

Employee Name	Position	Quarter	Q1	Year	2026
Aline Mukama	HR Bus Partner, Commercial Banking	Team/Dept	HR Department		
<b>How to Complete This Scorecard:</b> Choose Objectives that describe what you want to achieve this quarter using SMART outcome statements (specific, measurable, achievable, relevant, and time-bound). For each objective, select 3-5 Key Results that define how success will be measured, set targets & deadline upfront, and complete achieved & comments at the end of the quarter. Identify a personal Development Goal for the quarter that describes the leadership skill you want to learn, for example becoming more curious about others' ideas or increasing engagement & collaboration.					
<b>Objective 1. Acquire and retain talent to keep the Commercial Banking Department at Full Complement in Q1</b>					
Key results 1.1. Fill current three vacancies					
1.2. Recruit turnover under 5 percent					
1.3.					
<b>Objective 2. Ensure high engagement from staff in Q1</b>					
Key results 2.1. Achieve 80 percent engagement survey score					
2.2. Respond to grievances within 24 hours					
2.3. Complete monthly team-building activities					
<b>Objective 3. Build strong foundation for training, development and successful planning in Q1</b>					
Key results 3.1. All staff have development plans					
3.2. Team building complete development discussions					
3.3. Succession planning workshop completed					
Development Goal for Quarter: Stay curious about other people's perspectives and learn to ask for and receive help when needed. <input checked="" type="checkbox"/> Achieved					

# Goal Setting

## Hierarchy



## Approaches

	Top down	Bottom up	Hybrid	Incremental
What is it?	Boss decides	Employees decide	Everyone decides	Last year plus a bit
Benefits?	Clear	Ownership	Learning	Quick
Risks?	No ownership	Play safe	Takes time	Uncreative
How to play?	Influence boss early	Challenge team	Think like the boss	Push for more!

## MADE-UP EXAMPLE - Individual Quarterly Scorecard Template

				Quarter	Q1	Year	2026
Employee Name	Aline Mukamana	Position	HR Bus Partner, Commercial Banking	Team/Dept	HR Department		

**How to Complete This Scorecard:** Choose **Objectives** that describe what you want to achieve this quarter using SMART outcome statements (specific, measurable, achievable, relevant, and time-bound). For each objective, select 2–3 **Key Results** that define how success will be measured: set targets & deadlines upfront, and complete achieved & comments at the end of the quarter. Identify a personal **Development Goal** for the quarter that describes the leadership shift you want to take, for example becoming more curious about others' ideas or increasing delegation & collaboration.

Objective 1.	Acquire and retain talent to keep the Commercial Banking Department at Full Complement in Q1				
		<i>Target</i>	<i>Deadline</i>	<i>Achieved</i>	<i>Comments</i>
Key results 1.1.	Fill current three vacancies	3 roles filled	31/03/2026	2 roles filled	● 1 at signing stage
1.2.	Maintain turnover under 5 percent	≤1 leaver	31/03/2026	1 leaver in Q1	● Achieved
1.3.					
Objective 2.	Ensure high engagement from staff in Q1				
		<i>Target</i>	<i>Deadline</i>	<i>Achieved</i>	<i>Comments</i>
Key results 2.1.	Achieve 80 percent engagement survey score	>80%	28/02/2026	85%	● Achieved
2.2.	Respond to grievances within 24 hours	100%	31/03/2026	100%	● Achieved
2.3.	Complete monthly team-building activities	3 activities	31/03/2026	3 activities	● Achieved
Objective 3.	Build strong foundation for training, development and successful planning in Q1				
		<i>Target</i>	<i>Deadline</i>	<i>Achieved</i>	<i>Comments</i>
Key results 3.1.	All staff have development plans	80 plans	28/02/2026	50 plans	● Behind Plan
3.2.	Team <u>leaders</u> complete development discussions	8 leaders	31/03/2026	5 leaders	● Behind Plan
3.3.	Succession planning workshop completed	1 workshop	31/03/2026	1 workshop	● Achieved
Development Goal for Quarter	Stay curious about other people's perspectives and learn to ask for and receive help when needed. ● Achieved				

## MADE-UP EXAMPLE - A SIMPLE INDIVIDUAL DEVELOPMENT PLAN



1. Employee Name	Aline Mukamana	2. Current Position	HR Bus Partner, Commercial Banking
3. Short-Range Career Goals (1–2 years) Specify positions	Manager HRBP team	4. Long-Range Career Goals (2–5 years) Specify positions	Director People & Culture

### 5. Developmental Objectives

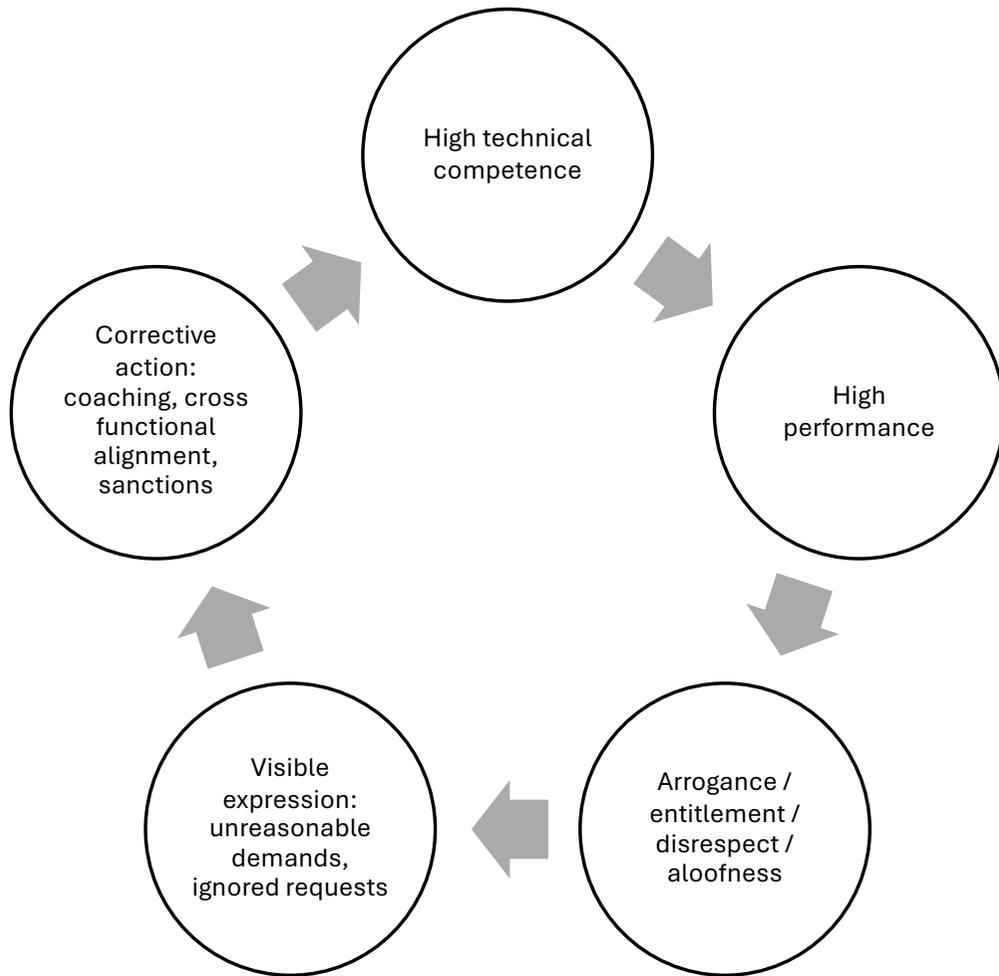
Knowledge, skills, abilities to develop	Supporting Developmental Activities, Assignments, Projects, Responsibilities	Supporting Formal Training Courses, Workshops	Other Activities Reading, Self-Development
A. <u>Organisational Development</u>	Complete recruitment of new commercial teams for Trade Finance, Agricultural Finance and Mining Sector Finance. Deadline – End 2026	None – on the job training, with mentorship from commercial leader	None
B. Understanding of complete HR function	Participate in HR Leadership Team where appropriate; take on assignments in other functions (e.g. comp and ben analysis) if opportunities arise.	Complete the RIKA program (20-week executive learning experience focused on key themes and competences in HR)	None
C. Team Leadership	Identify cross-functional task teams that Aline could lead. For example, on streamlining our onboarding processes	None	Suggest reading: The Art of Possibility by Rosamund Stone Zander

# MADE-UP EXAMPLE – SUCCESSION PLAN



	Managing Director	Commercial Director	Finance Director	HR Director	Legal Director
Incumbent	Adam Ashimwe	Christine Dube	Edward Furia	Gwendolyne Mwangi	Ignatius Jeffries
Ready Now	Christine Dube H H Board plan	Keith Limpopo H M None	None	None	Maria Nasajo H H Board comm.
Ready in 1 year	None	None	Olive Rumanyika H H Head of Credit	None	None
Ready in 2 years	Keith Limpopo H M Com Dir	None	None	None	Victor Tilahun H H Compl Mngr.
Ready in 5 years	None	Sonya Tshabalala H H Trade Fin Mngr	William Mwaura M H Stay in role	Aline Mukamana H H HRBP Lead	None
Emergency	Edward Furia	Keith Limpopo	Olive Rumanyika	External	Maria Nasajo

# Team Positioning Framework



Phase	Situation	Actions
Pre-emptive	Team performing well No unconstructive behaviours yet	Share recognition Acknowledge others Acknowledge luck! Tie praise to what and how
First signs	Neglect of low-status requests Flexing about value to org	Clear messaging on good corporate stewardship Quiet call outs on impact of non-constructive actions
Team-wide	Reputation growing More incidents	Team-wide discussion Values workshop!
Organisation impact	Resignations/drama Compliance miss	Sanctions - withhold rewards Discuss consequences Elevate / broaden perspective