

THE PA MEETING

Guide to People Review



THE PEOPLE REVIEW

Your People Review will be more successful if both you and your manager are well prepared for the meeting. Therefore, Danske Kreds has prepared this guide to help you prepare for the coming People Review.

We recommend that you focus particularly on the following subjects for your People Review.

Job profile

In preparation for the meeting, we recommend that you:

- Read the job profile which covers your job.
- You may find this job profile on the HR website.
- If you have difficulties finding it, your immediate manager or HR partner may help you.

Performance/goals/achievements/job satisfaction

- Assess yourself and your performance this past year. Review your calendar and email to restore your memory of the projects and tasks of the last year and write them down so that you can remember them at the People Review meeting. Which projects/tasks have been successful? What have you learned? How does this support the Group's strategy?
- Have you experienced any failures? What was the obstacle to success? How can you become better at handling the challenges next time?
- Remember that at your last performance meeting goals were set with respect to results and conduct. Read your PA document from last year: Which goals were agreed? Consider whether and how you have achieved these goals.
- The Group's core values are in focus. Your performance assessment consists of conduct and performance. The core values constitute the part concerning conduct. This applies retrospectively and for the coming year.
- You will have a performance assessment from your manager. If you obtain a low score according to the Group's guidelines, a special development plan must be prepared by you and your manager.
 - The special development plan must include the following: Competences/conduct to be improved, where and how this should take place, a schedule and an agreement on follow-up.

As a main rule, if you are at step 1 (educational step), you can only remain at step 1 for maximum 12 months.

There must be a development plan specifying how you will move to step 2 or 3. This plan will be prepared by you and your manager jointly.

All employees will be scored on their performance and behaviour by their manager. You can ask your manager about your score and what exactly it means for you.

The People Review meeting is a good opportunity to discuss any requests and suggestions with respect to job satisfaction and working environment.

If you see any challenges with respect to job satisfaction and working environment, you have a general duty to call attention to this.

Future job opportunities and competence development

- Ask whether your job is at risk of disappearing within the next 6-12 months. Your manager has prepared for this question.
- If there is a risk of job disappearance within 6-12 months, there must be specific focus on discussing competence development in order to improve your chances of a job transfer.
- Make sure that your training requirements are put on the agenda in relation to both the current and future job (see Karriereplan (Career Plan) and Finanskompetencepuljen (Finance Competence Pool)).
- Identification of your competences must initially take place internally and must be viewed in relation to other job functions in the Group.
- Ask about the focus on competence development in your function/unit, and assess whether your ambitions are covered. If not, you have to express your wish for competence development.

Contents of the development plan

- A plan for the maintenance of competences already acquired, which also includes the possibility for actual competence enhancement.
 - The competences which you must acquire in your current and future job
 - Schedule agreement on follow-up.
-

Career plan

Finansforbundet (Financial Services Union Denmark) offers to help prepare your career plan.

Your career plan can support you both in relation to your current job or a job at another job level.

www.worklifeinvestment.dk

Here, you may have an overview of your strongest general and professional competences as well as the competences that you wish to develop. You may use the competence overview as input for your career development plan and in your dialogue with your manager concerning your competence development.

If you have not had the time to prepare your career plan, you may have a talk with your manager about this once you have prepared it.

We would like to emphasise that Danske Bank supports the preparation of a career plan so that you have an overview of your perception of the direction in your professional life.

Finanskompetencepuljen (Finance Competence Pool)

This pool was established in connection with the most recent collective agreement.

You will find information about training opportunities etc. at www.finanskompetencepulje.dk

Please pay particular attention to the following:

- It is a requirement that you enter into a dialogue with your immediate manager prior to your application for training through the Finanskompetencepulje – this is to confirm relevance and ensure that any absence fits in with the department's planning.
- The Group is willing to give you time off to participate in the actual training programme if you have obtained confirmation of relevance and agreed on the time consumption with your immediate manager. However, you should expect to use your own private time for preparation.
- You can only participate in one training programme each year (within a period of 12 months).

English

English is becoming more and more important – in fact, in some places it is crucial.

An increasing number of job profiles require proficiency in English and this increases the focus on whether your competences match or will match the requirements in the future.

In some jobs, proficiency in English may not be crucial, and therefore it may be necessary to spend time and resources clarifying future requirements and expectations with respect to competences. In the minutes of the last meeting in the international cooperation committee, the following is stated:

Where training is needed, we need to assess the individual needs. If there is a need, training must take place. It is important that all employees have equal access to understanding English.

If you feel that you need to develop your English skills, you must discuss this with your immediate manager and ensure that it is included in the People Review. However, this need can always be discussed when it arises. If your competences need to be developed, it must be stated in the development plan (see relevant section). If you feel that a justified requirement is not met, you may join forces with your union representative who will support you with arguments in relation to legitimate requirements.

The individual allowance

Your manager will fix your individual allowance based on your overall performance.

In connection with the fixing of your individual allowance, account has been taken of the development of your performance and whether you have acted and performed in an extraordinary manner based on the expectations of the job. At the most recent follow-up meeting, your manager assigned you criteria which are of particular importance for the fixing of your individual allowance. On this basis, it is assessed whether the performance provides a basis for maintaining or adjusting the current individual allowance.



Figure 1: The figure shows the link between performance assessment and individual bonus. As a rule of thumb, your individual bonus should be within the green areas.

Your salary

During the negotiation of the collective agreement in spring 2017, the funds were spent on general pay raises for all employees. However, if your performance has improved, it is still the Groups responsibility to reward it.

Test and certification

If you belong in the category of employees who will need certification or testing in the future, you need to know that the

Group has prepared guidelines for the testing and certification of employees. See the guidelines on the HR website.

Write it down

Danske Kreds encourages you to write down and keep your agreements with your manager with you for future meetings.

If you have any questions or want advice or guidance, please contact Danske Kreds on R3908.

Or contact the following Danske Kreds board members directly:

Lars Aabling-Thomsen, AABL
 Kirsten Guntofte, KIKRI
 Carsten Eilertsen, CEI

THREE PEOPLE REVIEW MYTHS



There are no available funds for pay increases

Myth: My manager refuses to give me a pay increase and an individual allowance in connection with my salary review based on the argument that there are no funds for pay increases in the collective agreement.

Reality: It is not stipulated anywhere in our collective agreement that pay adjustments can only be financed by collective agreement funds. On the contrary, it is the employer's responsibility to reward an employee who performs above the expected performance level.



Competence development is not relevant for me

Myth: My manager feels that I am really good at my job. I also think so myself. There is consequently no reason to talk about competence development at my People Review.

Reality: You and your manager have a duty to talk about the future development of your position when conducting the People Review. This includes your performance, the balance between your job requirements and your competence, your well-being, the future prospects for your current position and competence development.



There are no training opportunities for my position

Myth: My position is perfectly defined, and there is no need for or offers of further training that are suitable for developing my current position.

Reality: You can always become better at what you do. No matter how good you are at your work, there is always a basis for personal development and for preparing yourself to take on new work tasks when they arise. This can be achieved through courses, certifications, peer-to-peer training or by trying your hand at tasks that are at the fringes of your competence areas.