

**My Performance Scorecard FY16**

Employee name: Business Protection Specialist  
 Role: Business Protection Specialist

Division: NAB FP  
 People Leader name:

Short-Term Value			
Financial Metric	Measure	Target Met Expectations	Target Exceeded Expectations
Increase the number of customers protected through a Risk solution	Number of Lives Insured as measured by policy completions via MLC or non MLC (excluding completed policies referred by a SFP as recorded in NABView)	Lives Insured	Lives Insured
New Revenue Generation	New Revenue	BPS Revenue Share	BPS Revenue Share
Metric	Measure	Target Met Expectations	Target Exceeded Expectations
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
Deliverable	Measure	Target Met Expectations	Target Exceeded Expectations
Wider Wealth Strategy	Improve the experience and engagement levels of our customers by providing a full range of business and personal risk solutions	JSOA's implemented where 2 or more Business Risk needs (Ownership, Debt, Asset, Revenue or Business Expenses) are addressed	SOA's implemented where 2 or more Business Risk needs (Ownership, Debt, Asset, Revenue or Business Expenses) are addressed
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 Hieman, NABView, Xplan, Paraplanning and pooled CSO & CSA support.	- Consistent weekly recording of activities and updating of opportunities within NABView - Demonstrated use of Miller Hieman philosophies in customer and banker interactions - Feedback received from CSO's, CSA's and Paraplanning regarding the use of Xplan and quality of referrals	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			
KPI	Measure	Target Met Expectations	Target Exceeded Expectations
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 to new customers received from existing NAB FP customers resulting in a 1st appointment	referrals per annum to new customers received from existing NAB FP 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:**