

(NB: In the light of events by then (see my [17.01.08 Grievance to KPMG](#)) I had secretly recorded the meeting. This is [the transcript](#) – I did NOT give to KPMG)

(Had to come over from Canary Wharf where located since beginning of week)

C: approach: goals v. what have done, went well / not well, like / did not; then development, skills & behaviour, career = going through form

N: my objective is to get clarity on my position at KPMG

C: not for this meeting, it's goals and won't discuss what I wrote on form about what's happening in my personal life

N: but what happened relevant because impacted on me for half the year. Who will discuss that?

C: won't discuss. Unlike before, and as I captured on form, I am now letting what's happening in my personal life come into my work

N: because of what happened; I wrote that on form that, at mid-year appraisal, even though I was suffering greatly from what was going on in my personal life, I did not say anything. But then my problem did come into my work life, because when Ladsky apparently came to KPMG to make false accusations, KPMG then took action against me. That's why I put it in.

C: not going to discuss; if I insist, no point proceeding as it's not purpose of this meeting

N: but it has impacted on my work. Practically whole month of April I had no access to intranet. Had a devastating effect on me. Was in tears at my desk practically everyday as getting automated messages that made me feel as though was a criminal. And if consider just fact I had no access to intranet, my main work tool, it obviously impacted on my ability to work. That's a fact, it has impacted on me and that's not surprising.

C still refuses to consider saying outside scope of this meeting. Says doing my perfo appraisal as she is doing for the others (NB!)

N: I continue to argue that what has happened cannot be ignored because it took place in KPMG, and it HAS impacted on my performance.

C continues to refuse to discuss it, evades what I am saying, keeps trying to make her position stick that I have let what's been happening in my personal life come into my work life. For 2nd 3rd time comment of ending meeting if I insist on discussing

Projects

N: all substantial projects and, overall, no follow-up

C: made various notes on my form, Qs, dots. I am manager, for long time; expect manager to run with things

N: yes, not progressed from manager for 7 yrs. **Services:** prepared slides for an Advisory meeting. Did not hear anything back.

C ignores my point; talks about **industries**, I should have approached them

N: I think presentation was due to be made to industries and I prepared summary slides for that. No follow-up. What happened? What was feedback? What actions?

C continues explaining how industries need to operate

N: put in my form role needs to be defined, scope of work very large; some don't have credentials. Also, changes in industry leaders due to transition. Who should I go and talk to? A while back asked Peter name of industry leaders, had not been nominated

C: leaders change, hence I could still have done it.

N: I can't contact service lines saying collecting material on behalf of industries without first talking to industry leaders. **My role** needs to be formalised.

C: up to me to define my role.

N: I read what I captured in my form about needing to define my role + need for resources. Role needs to be defined, scope, objectives, what exactly am I going to do so that there is understanding on expectations. Also say that long time ago I have mapped out how process should work for getting info from service lines to

industries. In addition to structure up in the air, also had issue of moving to new platform: stopped people e.g. FRM; IT advisory

At some point C agrees I have very good knowledge of product portfolio + quality of my work is of undeniable very strong quality, eye for detail, high level of accuracy.

C continues trying to make that one stick i.e. that I am not proactive; says views me being now task oriented.

N: **Marketing** content: John did not communicate I should also load content. Not an issue. I did it as taught on course. In future, get out of people what want from beginning to end. (I view being asked to input marketing content as looking for an opportunity to say that I had been on a course and could not do it)

SharePoint: I joined network + have contacts in Canary Wharf

N: use of **new media**: also no follow-up; who using it? Proving useful?

C: Superb piece of work, done very quickly, very useful

N: **Newsletter**: also no follow-up

C: on hold due to other coms being sent

N: **survey**, also no follow-up

C: explains on hold due to output from other research; says will send me this output (Note at 27 Oct: she has not)

C says there is something she should have pointed out at beginning: she has another meeting at 5 p.m. Will need to set-up another meeting later on this week, will ask Ruth to set-up. Says in the minutes left should finish talking about my goals, projects section. Says will need another one hour meeting to finish process, and that will be in CW on Friday, might do it then.

C asks whether I use Microsoft communicator. I reply I don't. C says that a lot of people use it, easy for communicating with her e.g. if she is on the phone. Adds I don't have to use it. (Note: Microsoft communicator leaves of no record of communication – at least to the employees)

I raise C email about Xmas holiday. Say that everyday I come to work I ask myself whether it is going to be my last day. Reply: very strange comment to make. C probes if I am going to see my friend in Leeds. Then, if I have plans for other holiday. I reply I never know what the next day is going to bring

Concs

- Several times said I had let what taking place in my personal life come into my work life; refused to hear that it is KPMG taking action against me that led me to raise it due to impact on me
 - Refused to discuss fact that events that took place affected my ability to work, and attempted to shut me up by saying that if I continued she would end meeting
- End August + in Sep when I asked why my perfo appraisal had not yet been scheduled C replied she was waiting to hear from HR = more than 2 months for what outcome? : Refused to discuss it
- Turned to my goals re services and industries: aim to portray me as not being proactive
- While she is my manager – and is the project lead - C said I should have asked her the outcome of meetings at which my findings were discussed – (I don't even know when meetings took place). Says she is very busy i.e. can't be expected to remember to tell me
- As she expected me to approach service line and industry leaders, why wasn't I asked to attend the meetings? Surely this was the time to introduce me; discuss my findings; discuss how I could best help the leaders, and agree on actions.
- When I highlighted fact I had written on form that 'my role needs to be defined, said up to me to do that. How could I do that without knowing what had been said at meetings?
- Brushed over my replies about changes in structure, appointment of new leaders, hence: implication on who, and when to contact
- Towards end of meeting C announces she must go to another meeting. **'KPMG guidelines on performance management 2007'** "You should allow sufficient time for the meeting e.g. two hours, and ensure priority in your diary" Never, in my 10 yrs at KPMG have had a perfo appraisal handled in this way.

📌 = purpose of meeting was to determine what they can make 'stick'.

Thursday 11 Oct: sent email to C that I have not been contacted about follow-on meeting + will now miss tomorrow's final deadline (coms that people who have not filed form by then will lose their bonus for 2006/07) C reply: been given an extension till next week. My reply: not seen any comms about this

Friday 12 Oct: C is in Canary Wharf. Around 10h30 – 11h I ask about comms she referred to. Reply: got it from HR. I ask for a copy. C left at lunchtime. By close of play I had not received anything

On **Monday 15 October** at 10h05 I wrote to Jeanette Dunworth, HR, relating events since the end of June. Jeanette replied at 17h40 saying that she would *"look at the points I raised"*. She also stated that the deadline had been extended to Friday 19 October. I replied at 18h05 *"What I am looking for is honesty. What has taken place is totally unlike Ceri whom I have always perceived as highly professional. This includes following the KPMG policies on performance appraisal 'to the letter' "*(attached ¹)

Wednesday 17 October 2007 – Ceri sends me an email saying that she has met with HR and that in light of my email to HR on Monday *"we feel that it is not appropriate for me to continue the discussion"*. That *"HR have advised that I discuss this with Peter Bassett and we jointly identify who can finalise this process with you"*. Anticipate doing this next week (due to diaries) (attached ²)

Friday 19 October 2007 – Jeanette Dunworth sends me an email saying that *"Peter Bassett has confirmed that he will be taking this forward..."* Also that *"a member of the HR department will also attend the meeting to ensure that your appraisal is finalised in a fair and independent way"* (attached – at the bottom of the trail of emails ³)

Monday 22 October 2007– Peter Bassett sends me an email asking when we can set-up a meeting. Among others, he copies Kathy Woodhouse on his emails. I assume that it must be the *"independent HR person"*. We fix the meeting for Wednesday 24 in the morning (see attached above email)

Tuesday 23 October 2007 – At 13h11 I receive an email from Kathy Woodhouse to *"introduce myself"*. (attached ⁴) She offers me the opportunity to phone her. I manage to talk to her at the end of the afternoon. Of note she says: *"it may be that there is disagreement on the conclusions that we reach tomorrow, but at least they will be arrived at in the presence of an independent party"*.

The meeting took place, as planned on Wednesday morning, 24 October – see my notes.

¹ My 15 October 2007 email to Jeanette Dunworth, HR, and replies

² 17 October 2007 email from Ceri to me

³ 19 October 2007 email from HR and 22 October 2007 exchange of emails with Peter Bassett

⁴ 23 October 2007 email from Kathy Woodhouse