

Performance Review

Note: Manager completes all pages and Internal Stakeholder completes only the last page. Internal Stakeholders must be employed for at least 90 consecutive days in the current review period before they are eligible to participate in the review process.

Review Period Manager

Internal Stakeholder Title

E = Elite

TA = Top Achiever

A = Achiever

C = Contributor

NI = Needs Improvement

- i**
- 1 Highlight key areas that are most important when considering the stakeholder's job responsibilities (weight them accordingly).
 - 2 Highlight key areas for improvement.
 - 3 Highlight key areas of greatest success during the review period.

Core Attributes - Personal Attributes

E	TA	A	C	NI	Coachability Graciously accepts feedback Committed to change Awareness about one's self and others
E	TA	A	C	NI	Sound Judgment Exhibits sound and accurate judgment Includes appropriate people in decision-making process Capacity to address situations and circumstances skillfully
E	TA	A	C	NI	Positive Attitude Motivating those around you with a positive word Showing gratitude for what you have Encouraging others to do and be their best
E	TA	A	C	NI	Adaptability Open to accepting opinions and practices different from your own Shows flexibility Can work well with everyone
E	TA	A	C	NI	Confidence Belief in your ability to perform the job Exhibits resourcefulness Exudes professionalism and poise

OVERALL RATING **PERSONAL**

Core Attributes (cont) - Team Based

E	TA	A	C	NI	Cooperation Exhibits tact and consideration Displays positive outlook and pleasant manner Works collectively in group situations
E	TA	A	C	NI	Dependability Can be counted on in any situation Takes responsibility for own actions Meets attendance and punctuality guidelines
E	TA	A	C	NI	Problem Solving & Critical Thinking Identifies problems in a timely manner Gathers and analyzes information skillfully Develops alternative solutions
E	TA	A	C	NI	Respect Exhibits active listening to others Acknowledges others and their ideas Builds commitment from others
E	TA	A	C	NI	Communication Skills Exhibits good listening and comprehension Keeps others adequately informed Uses appropriate communication methods

E
TA
A
C
NI
OVERALL RATING **TEAM BASED**

Core Attributes (cont) - Position Based

E	TA	A	C	NI	Job Knowledge Competent in required job skills and knowledge Requires minimal supervision Displays understanding of how job relates to others
E	TA	A	C	NI	Client Service Gives high priority to achieving client satisfaction Exhibits the utmost follow-through with all client needs Devotes extra time to going above and beyond for clients
E	TA	A	C	NI	Planning & Organization Manages time efficiently Sets goals and objectives Displays high attention to detail
E	TA	A	C	NI	Productivity Displays efficiency when handling multiple tasks Shows incredibly high work standards Exhibits sense of urgency when completing projects
E	TA	A	C	NI	Initiative & Self Direction Volunteers readily Undertakes self-development activities Seeks increased responsibilities

E
TA
A
C
NI
OVERALL RATING **POSITION BASED**

Management Only - Leadership Attributes

E	TA	A	C	NI	Execution Turns thoughts into actions Provides clear goals to support overall strategy Determines how resources can be arranged for maximum productivity
E	TA	A	C	NI	Influencing Transforms something strong into something superb Makes connections with others Inspires others to achieve greatness
E	TA	A	C	NI	Relationship Building Recognizes and cultivates the potential in others Figures out how different people can work together productively Possesses a contagious enthusiasm
E	TA	A	C	NI	Strategic Thinking Creates powerful connections Imagines what might be possible that isn't readily apparent Refines information to build a broad knowledge base with robust insights

E
TA
A
C
NI
OVERALL RATING **LEADERSHIP**

Overall Performance - Summary

E	TA	A	C	NI	Personal Attributes Ability and willingness to add value to the firm.
E	TA	A	C	NI	Team Based Attributes Ability to contribute effectively to the team.
E	TA	A	C	NI	Position Based Attributes Ability to provide insight and knowledge in their role.
E	TA	A	C	NI	Leadership Attributes (Management Only) Ability to attain company goals while instilling passion and commitment into others.

E
TA
A
C
NI
OVERALL PERFORMANCE **SUMMARY**

S.M.A.C. Goals

Are these goals **SPECIFIC | MEASURABLE | ACHIEVABLE | COMPATIBLE**? How do the Individual Stakeholder's goals align with the Company goals? How will the Stakeholder's strengths help them to achieve their goals?

Individual Goals for Next 6 Months	Goal #1
	Goal #2
	Goal #3
Stretch Opportunities for Next 6 Months	Goal #1
	Goal #2

Stakeholders who set goals that are based on their personal strengths are **7 TIMES MORE LIKELY** to be engaged in their work.

How to develop in role?

List any additional comments here:

The internal stakeholder may respond to any of the comments made above. Please attach a separate piece of paper with comments.

Internal Stakeholder Signature

Date:

Manager Signature

Date: