2600 Phrases for Effective Performance Reviews

Ready-to-Use Words and Phrases That Really Get Results

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Introduction: How to Use This Book in Order to Save Time and Write Compelling Performance Appraisals

If you’ve purchased this book, you’re serious about strengthening your written communication skills and developing your subordinates. The truth of the matter is that most performance reviews in corporate America are drafted without much thought and are submitted well after the deadline—not much of a motivational tool for workers longing for appreciation for a job well done. Yet taking the time to formally appraise employees’ performance once a year has much more significance than many managers realize.

In poll after poll, workers rank pay fourth or fifth on the list of critical workplace factors—well below the critical areas of open communication and recognition for a job well done. American management teams fail to recognize the critical importance of ongoing feedback and staff development in employee retention matters—even when there are scarce dollars available for merit increase pools. The optimal leadership style provides ongoing feedback day in and day out on a regular and predictable basis. The best people managers realize that by shifting responsibility for employee performance evaluations back to their staff members, they take themselves out of the role of unilateral decision maker and disciplinarian and place themselves into the role of career mentor and coach.

In addition, managers who stand out among their peers recognize that the Development section of any performance appraisal is the most critical piece of the process because it constructs a blueprint for employee growth and learning. The learning curve is indeed the glue that binds people to companies. Despite small merit increase pools or opportunities for vertical promotion available in any company at any particular time, satisfied employees will perform at their best and remain loyal when they feel connected, sense that they make a difference at work, and add critical skills and experiences to their resumes.

They say that people “join companies and leave managers.” It’s also said that the difference between an active job seeker and a passive job
seeker is one bad day in the office. If your most respected critic were to objectively evaluate your leadership abilities and staff development skills, how do you feel you would rank if were evaluated according to the following criteria:

➤ How effective are you at delegating to and motivating your staff?
➤ How consistent are you in putting their career and development needs above your own in a goodwill attempt to help them build their resumes and prepare for the next step in progression in their careers—at your company or elsewhere?
➤ How well do you address performance achievements and problems day in and day out so that subordinates understand what is expected of them and how success is measured in your group?

The annual performance appraisal process is the once-a-year validation that someone is making a positive difference—that their contributions over 365 days of work are formally recognized and celebrated. Yet, too many managers fill in annual appraisal forms in a perfunctory fashion, looking at the process as a bothersome, yet mandatory task. Enlightened managers, on the other hand, make their jobs much easier by delegating appropriately, listening attentively, and having fun at work. It’s not that hard to transition to “enlightened management” status: All it takes is a willingness to rethink your role in your company, your influence over those you supervise, and your ability to bring out the best in others by motivating them to reach beyond their comfort zone.

Remember that motivation is internal. You’re not responsible for motivating your staff, per se; people are responsible for motivating themselves. You are, however, responsible for creating a work environment in which people can motivate themselves and find new ways of reinventing their work in light of your company’s changing needs. To that end, this book will serve as a handy time saver, a narrative assistant, and an insightful guide into new ways of recognizing and rewarding performance.

How to Use This Book

It is often the case that managers avoid or delay written communication tasks that may appear to be confrontational. Similar to a book I’ve written
called *101 Sample Write-Ups for Documenting Employee Performance Problems: A Guide to Progressive Discipline and Termination*, this book’s key purpose is to help you find the right words and descriptive phrases to communicate your thoughts and perceptions in a concrete manner for specific situations.

In **Part I**, we’ll address the most commonly rated performance factors, or “core competencies,” that a majority of companies use to assess their workers. Included among the core competencies are the topics of “managerial style” and “personal style”—often the most difficult issues to describe in an annual performance review. The phrases in these sections fit a variety of interpersonal and managerial styles, commitment levels, pace, need for structure, emotional intelligence, and ability to prioritize and juggle multiple tasks. Refer to these sections any time you have a difficult time finding the right words to describe an individual’s preferences, inclinations, peculiarities, or other outstanding features. You might just find a special way of phrasing something that, up to now, you’ve had a hard time identifying and describing in others.

For each of the commonly rated performance factors in **Part I**, we provide descriptive phrases that can be used to evaluate *historical* performance, organized in two sections:

**Meets/Exceeds Expectations**
**Needs Improvement**

For all of the core competencies we also provide a third section called “Goals.” This section provides multiple examples of development plans for outlining key areas of *future* growth and learning. These phrases will help you structure your recommendations for employee improvement over the coming review period. As with the two other sections, you could simply use these statements “as is” or customize them for your particular needs.

Simply stated, forward-looking development plans give you a process to prevent future performance problems and to create an environment in which employees could motivate themselves. That, more than anything, will give you peace of mind and turn you into a motivator and coach rather than a unilateral disciplinarian and decision maker. Your employees will benefit too as they’re given the freedom and discretion to self-monitor and self-correct in an empowered environment. There’s no greater formula for enlightened leadership.
Whereas Part I covers general core competencies, in Part II we address the functional components of many common positions in Corporate America, including positions in sales, marketing, finance, legal, human resources, operations, information technology, and manufacturing. It is important to be able to benchmark particular functions and responsibilities that are common in such universal positions, and to address performance expectations for each.

There are four appendixes in the book. Appendixes A and B provide useful lists of high impact verbs and adverbs that will prompt you when finding just the right word tends to escape you. Appendix C is a brief discussion of merit increases and the five-point grading scale. Appendix D is a short index of the titles and roles that appear in this book.

In essence, in this book you have a handy library of practical, ready-to-use phrases that will help you acknowledge outstanding job performance, address substandard work quality, and outline developmental opportunities for your direct reports. In addition to saving time, you’ll strengthen your self-confidence and distinguish yourself in writing as a leader and career builder.

**The Performance Management Cycle**

There are three components of the Performance Management Cycle:

1. Goal setting and planning
2. Ongoing feedback and coaching
3. Appraisal and reward

The annual performance appraisal clearly speaks to the third issue, but appraisal and reward can’t be accomplished in a vacuum. That third stage is the culmination resulting from ongoing efforts in the first two stages. The performance management cycle is a continuum leading to a particular resolution in the final (third) step, but all three stages are intrinsically linked to the end result—the performance appraisal and associated merit increase (reward).

Annual performance appraisals are not meant to be a paper chase—a mandatory exercise that creates a snapshot of your impressions as a supervisor about a subordinate’s work. Instead, they should be a collaborative effort that builds on open communication and constant
feedback. Thus, investing in goal setting should be a two-way communication: Employees who have advanced input into their own career development will typically buy in to the suggestions much more readily than when those goals are imposed from above. And remember, no matter how “perfectly written” these goals are on the actual performance appraisal form, they’ll be useless without ongoing communication throughout the review period.

So keep a copy of each of your staff member’s annual reviews in your desk, and make sure they do the same. Develop a habit of reviewing the status of performance achievement and skills development on a quarterly basis. You’ll find that your business relationships will be focused, you’ll never again feel like you’re flying blind, and your subordinates will have less of a need for ongoing supervision.

Ten Tips to Maximize Your Performance Appraisal Documentation Skills

Whenever you pull this book down from your bookshelf as you’re preparing to write a subordinate’s performance review, keep the following rules in mind:

Rule 1: There should be very few surprises in the annual review.
This is a “total recall” document reflecting twelve months of work. If something totally new needs to be surfaced now, you probably didn’t do a thorough enough job communicating with the employee throughout the review period.

So sharing performance concerns for the first time during the performance appraisal should be the exception, not the rule. Still, sometimes it may be necessary to do so, even though that may appear to “blind side” the employee. Nothing is more demotivating than finding out that your overall performance didn’t meet company expectations when you thought you were doing fine. Typical complaints sound like this:

“I can’t believe my boss. She gave me an overall review score of 2 out of 5, meaning that I didn’t meet expectations. It would have been nice if she’d told me some time over the past year that I needed to improve in a particular area. She’s always so nicey-nice and perky to your face,
and then she stabs you in the back on the annual review. Well, I have a pending meeting with the division president to discuss my supervisor’s shortcomings, and this review she gave me will be the first item of discussion.”

To avoid such lose-lose situations, whenever you’re faced with documenting new issues for the first time in an annual review, acknowledge in writing that the matter hasn’t been formally brought to the employee’s attention beforehand. For example, “I recognize that we haven’t formally discussed …, but I felt it appropriate to bring this issue to your attention during this annual performance review because….”

Assuming you have a compelling reason to include brand new information in a document that covers an entire year’s performance, this open and honest approach will make your documentation appear to be more objective and evenhanded. More importantly, the employee may perceive the entire matter as ultimately fairer because the disclaimer at least acknowledges that this is new terrain.

**Rule 2: Review the employee’s prior year performance review(s) before attempting to draft a new appraisal.**

Performance reviews aren’t meant to be conducted in a vacuum. They only make sense if they logically follow the prior year’s performance appraisal notes. Therefore, look to prior reviews for areas of particular strengths, weaknesses, or areas for development. Which areas have improved? Which areas have remained stagnant and in need of further development? What’s the overall performance trend when comparing this year to last year?

**Rule 3: Understand how documentation can be used against your company if composed the wrong way.**

Here’s a special consideration: When employees are terminated for cause and bring wrongful termination actions against prior companies, judges and arbitrators look to the consistency in a company’s written communication in order to justify the termination and determine which party prevails. This written record is typically found in the form of written warnings and annual performance reviews, laid out side by side on a table as exhibits. But which one is more important in an arbitrator’s eyes: the annual review or the written warning?

Generally speaking, the annual appraisal is given more weight in legal
deliberations because it covers an entire year’s work. A written warning, in comparison, could simply be the result of one bad day in the office or a short-term string of thoughtless acts or omissions. Think of it this way: A written warning typically functions to break the chain of positive performance evaluations that’s been documented over a number of years. Still, the annual appraisal is generally viewed as the “anchor” document that evidences the company’s formal communication record with its worker.

In comparison, the written warning serves to reestablish and redirect the company’s written communication record by placing an individual on notice that failure to provide immediate and sustained improvement may result in further disciplinary action, up to and including dismissal. Disciplinary consequences written this way clearly state that an individual’s position is in serious jeopardy of being lost. It would subsequently be very difficult for plaintiff attorneys to argue that their client (your ex-employee) was denied workplace due process because the individual couldn’t discern—based on your company’s formal communication record—how serious the situation had become.

The question you have to ask, of course, is whether one written warning or multiple warnings will be necessary to justify a termination. That can only be answered on a case by case basis, depending on an individual’s tenure, historical performance record, and protected category status. Remember, however, that you have a lot more discretion to terminate or issue a final written warning for a first-time “conduct” offense (like theft or insubordination) than for a “performance” infraction (like substandard work quality). In the case of performance infractions, you’ll typically be expected to provide workers with all the steps of progressive discipline typically accorded under your company’s policies and past practices, which could include written and final written warnings as well as suspensions, in some cases.

However, if written warnings are subsequently followed by a positive annual performance review showing that the employee has improved and now meets company expectations, then that positive performance evaluation will, in essence, nullify the written warning issued during the review period. So if you have any remote hesitations about an individual’s ability to make it in your department or company in the upcoming year because of his subpar job performance or inappropriate workplace conduct, document it! You should grade the individual as “not meeting expectations” in the “Overall Score” section at the end of the performance appraisal form.
Otherwise, the positive record that you create today will make it harder to terminate the individual tomorrow.

Rule 4: Performance reviews are absolute, not relative.

Too many unsuspecting, yet good-hearted managers feel that they’ve given an employee a real message regarding their substandard performance by assigning them lower grades than everyone else on the team. If the other four employees in your unit received “exceeds expectations” scores (for example, 5 out of 5), and this particular individual received only a “meets expectations” score (for example, 3 out of 5), shouldn’t she realize that she’s performing poorly?

Absolutely not! If the company deems a 3 an acceptable score, then the employee hears that she’s met expectations. In a court of law, that individual employee may state that she realized that she scored lower than everyone else in the department or that she had no idea what scores the others received. In either case, her lawyer’s argument will simply state that she had no idea that her job was in jeopardy because her overall score was acceptable.

The lesson here is simple: If the overall score for the performance period shows that the individual is not meeting company expectations, then your communication record will remain consistent and incontestable in its intent. On the contrary, trying to hang your hat on the “message” that one person received the lowest overall score in the unit is no defense to a wrongful termination charge. A jury most likely would not sustain your logic that the employee had cause to believe that she was heading down the road to termination.

Likewise, most performance appraisal forms have nine or ten individual categories in addition to the “Overall Score” at the end. Substandard scores in individual categories will certainly help your case if you’re forced to defend a termination, but in and of themselves, they may not be an absolute defense. Instead, be sure to give the individual a failing “Overall Score” at the end of the appraisal form to reflect unacceptable performance for the entire review period.

Rule 5: It’s okay to give an A.

Do you remember those college professors who never gave A’s? It seemed that no matter how hard you worked or how much extra credit you turned in, they were simply implacable: An A was little more than a lofty dream.
It shouldn’t work that way in the workplace. Saying thank you for a job well done and recognizing special achievements should be a matter of practice, not a matter of exception. It’s perfectly acceptable to write at the conclusion of an appraisal:

Patty, thank you for your ongoing contributions and continued hard work over the past year. You’ve made our department a better place by your willingness to assume additional responsibilities, your friendly customer service, and by the care you put into everything you do. Keep up the excellent work, and remain a role model for your peers. I’m proud of you and very appreciative of all you’ve done.

Again, your merit pool may only be 2 percent, or maybe you have no merit pool at all this year. The overall score on the review shouldn’t be lowered because you have a smaller merit pool than you’d ideally like to have. What’s important is the written message: Those parting words in the annual review, now made into a formal company record, will have an incredible impact on your employee’s sense of job satisfaction and self-worth. And think what a gift you’ll have given her to share with family and friends at home as well as perspective employers in years to come.

Of course, you should also be a bit cautious about being too flowery in your accolades and compliments. Should that employee later fall from grace and you terminate the individual for cause, your stellar recommendations from prior years may be enlarged and placed before a jury as evidence of the individual’s worth and work ethic.

Rule 6: Don’t give everyone A’s!

If you routinely give all of your direct reports the highest overall grade rankings, you’re probably doing something wrong. It’s possible to say that at one particular point in your career, every individual member on your team may be the best worker you’ve ever had the joy of supervising. Maybe you’ve got the best line-up of staff members in your entire industry. Reality, though, is probably not quite as optimistic: Managers who award A’s to everyone on their team often have the problem of distinguishing between genuine superior performance and overall good work. They also often wish to avoid the confrontation that comes with providing more down to earth, albeit realistic performance scores.

The solution is pretty simple: Rank order your staff in terms of who is your most critical contributor versus who probably would make the least
difference if she resigned tomorrow. Your superstar would be a 5; your “least stellar” worker, who still performs at a very acceptable level, would be a 3. Your other staff members will probably fall into the 4 category.

Think of it another way: You’re not doing your subordinates any favors if you continuously give them 5s. Agree together on areas for growth and learning and push them to develop their technical skills and formal education by attending discipline-specific workshops and conferences. It’s a more honest appraisal methodology, and a 5 will really be something to strive for.

If you’ve only given 5s in the past but want to give more 4s and 3s this year, simply hold a staff meeting in advance of the performance appraisal meetings and let your subordinates know that you’ll be evaluating everyone differently this year. State that although you’ve typically given higher grades to the group in the past, you want to work on customizing each appraisal this year in terms of objective feedback and development plans. That means the overall scores may be a bit lower, but the value of the entire process, especially the development plan, will increase, and that’s to everyone’s benefit.

**Rule 7: Whenever possible, shift the responsibility for evaluating performance back to your employees.**

The reason most employees receive their evaluations late is because supervisors don’t have the time to collect the data necessary to write a good review. In addition, since relaying negative news can be confrontational (and we all know that the path of least resistance is avoidance), many supervisors postpone documenting subpar performance for fear of making matters worse with the staff.

You’ll find (much to your surprise!) that many employees will appreciate the opportunity to bring to your attention their perceptions of how they’ve done, what they plan to do, and how you could help. And that automatically puts you in the role of career mentor and coach—not unilateral decision maker and disciplinarian. You’ll also learn that the majority of workers will be harder on themselves than you would have ever been. That should take some of the stress off of you in terms of having to surface negative information.

It works this way: About a week before you need to draft your staff appraisals, instruct your direct reports to address their overall performance in three critical areas:
1. Address your overall performance track record for this review period. Specifically address your achievements that have resulted in increased revenues, reduced expenses, or saved time. Why is XYZ Company a better place for your having worked here? How have you had to reinvent your job in light of our department’s changing needs? And how would you grade yourself in terms of work quality, reliability, interpersonal communication, and technical skills?

2. In what area(s) do you feel you need additional support, structure, or direction? Specifically, where can I, as your supervisor, provide you with additional support in terms of acquiring new skills, strengthening your overall performance, and preparing you for your next move in career progression?

3. What are your performance goals for the next year? What are the measurable outcomes so that we’ll know that you’ll have reached those goals?

Once you receive their initial feedback, you could then go on to draft your own staff appraisal. By allowing employees to take the first stab at outlining their goals and achievements, you’ll automatically capture what they feel are their most significant issues. You’ll be reminded of the achievements they’ve made throughout the year, and you’ll be in a much better position to draft a comprehensive and objective annual report.

Expect an “emotional involvement rate” of 20–70–10 in this exercise, as follows:

- 20 percent of your staff will love this exercise and provide you with all the bells and whistles—productivity graphs, cost savings spreadsheets, and copies of letters of recommendation they’ve received from customers throughout the review period. (This is the key target group for the exercise.)
- 70 percent will do an adequate job in engaging themselves in the self-review process; however, their answers may be somewhat superficial or unsubstantiated.
- 10 percent may refuse to participate: They might argue that it’s your job to evaluate them and not theirs. But then again, that tells you a lot about their motivation and entitlement mentality, doesn’t it? Maybe their own refusal to participate should be incorporated into the narrative of the annual review as evidence of their overall work ethic.
On the other hand, you may naturally fear confrontation by allowing employees to initiate the process and have first say. For example, if you feel that one particular employee is a subpar performer, but that individual may think he’s the best thing since sliced bread, then you’re sure to invite conflict, right? Wrong! Remember, you write the actual review. This pre-review draft is not the actual appraisal form that will end up in the employee’s personnel file.

And if it turns out that you both have very different perceptions of the individual’s contributions, it’s okay to disagree. This will provide you a key opportunity to open up the lines of communication regarding reasons for the differences in your perceptions. After all, if you simply roll over the individual in the annual review process like a Sherman Tank with a onesided diatribe, you’ll only initiate a paper war with a stark rebuttal. Talk first, then write. If you both agree to disagree, then so be it. In the end, you’ll keep control of the entire process, your authority will remain intact, and you’ll initiate a dialog to reach a mutual ground. If the employee follows your review with a rebuttal nonetheless, it will likely be milder and “less attacking” if there have been open discussions before anything was committed to writing.

One final thought: Some employees will request formal feedback on a more regular basis than once per year. (You know who they are.) Consider formally reviewing them twice a year or even possibly once per quarter by shifting the responsibility for data collection and initial review back to them. In essence, they’ll do all the legwork, and you’ll create an environment in which they could motivate themselves. It requires a minimal time investment on your part, and you’ll find that they’ll spread the good news about your enlightened management style with their peers. Objective feedback on a consistent basis is what it’s all about.

Rule 8: Don’t formally document or otherwise discuss the merit (salary) increase during the performance review process.

If you document, “I believe Janet should receive a 5 percent merit increase this year based on her performance” or raise this issue verbally during the performance appraisal meeting, expect Janet to focus on salary from that point forward. Whether she challenges your overall merit increase recommendation or simply spends the next few minutes of the meeting trying to determine how much that 5 percent uplift will impact her biweekly paycheck, the focus will shift away from performance. Since this is a performance review as opposed to a salary review meeting, keep merit
increase discussions out of the meeting. They will only weaken your message and lessen your ability to bring about change in the individual’s performance levels over the upcoming review period.

**Rule 9:** You have the right to add disciplinary language to an annual performance review, turning it, in effect, into a written warning.

When managers confirm ongoing substandard performance issues in an annual appraisal, they often mistakenly believe that they must then wait an additional 30 or 60 days before initiating a formal written warning. In essence, the two steps may be combined to hasten the progressive discipline process.

Occasionally, it may be appropriate to add disciplinary language to the performance review itself, thereby turning the substandard performance appraisal into a formal written warning. Your narrative might look like this:

*In addition to documenting that your overall performance for this review period does not meet company expectations, this annual appraisal will also serve as a formal written warning. Failure to demonstrate immediate and sustained improvement may result in further disciplinary action up to and including dismissal.*

You’ll thereby have established a written record of communicating that the individual’s employment is in serious jeopardy of being lost.

Of course, this suggestion could seem a bit extreme, depending on your company’s policies and past practices, or a collective bargaining agreement may preclude such aggressive actions. Still, depending on the nature of the infraction as well as the employee’s tenure with the company and status as a protected worker, it could certainly be worth pursuing. When in doubt, speak with your HR department or qualified outside counsel, especially if this will be the first time your company will have engaged in this practice of combining annual reviews with formal written warnings.

**Rule 10:** Follow a few narrative-writing tips that will help you consistently strengthen your overall message.

First, be sure to avoid writing anything that could be interpreted as discriminatory. You may not document or reference anything protected by privacy or employee protection laws. For example, writing “Michael, you
are performing well since you began your new medication to combat depression, and I encourage you to continue” could very well violate the protections afforded by the Americans with Disabilities Act if the individual is later denied a promotion or terminated for cause. Similarly, if you reference an individual’s age, ethnicity, sexual or gender orientation, religious beliefs, medical history, or any other categories protected under Title VII of the Civil Rights Act or other state worker protection laws, then your own documentation could be used against you in a court of law. Similarly, if an employee was on a leave of absence for a significant part of the review period, simply document that “Michael was on an approved leave of absence from May 10 to August 8” and leave it at that. The reason for the leave (pregnancy, workers comp injury, stress leave) is superfluous and should not be included as part of the formal record established by the performance review. It follows that all performance appraisals should be reviewed in advance by your HR or Legal departments before they are shared with your employees to ensure, among other things, that no discriminatory language exists.

Second, avoid the term attitude in your formal business communication with your subordinates. “Attitude” is a very subjective judgment that courts will typically dismiss because it is often associated with a mere difference of opinion or a personality conflict. Instead, be sure to describe the objective behaviors that create a negative perception of the employee in others’ eyes. Only behaviors and actions that can be observed and documented belong in workplace discussions and may be presented as evidence in court.

For example, replace an admonition like this:

“As we have discussed throughout the year, you have received many complaints regarding your attitude. You need to demonstrate immediate improvement in this area.”

with something concrete like this:

“Peggy received a written warning on January 14 for raising her voice in anger and for using profane language directed at a coworker. The disciplinary warning specifically stated that if she ever again lost control of her temper, used profane language in the workplace, or demonstrated behavior that could be perceived as hostile or threatening, further disciplinary action up to and including termination
Third, use the phrase “For example” at least three times in an individual performance appraisal. Managers often make sweeping comments about perceptions without documenting the factual circumstances that justify their points of view. You could therefore easily turn a perception statement like “Your planning and organizational skills are satisfactory, but you sometimes require additional assistance in this area” into something more concrete and instructional for the employee by including an example.

Fourth, use the terminology “needs improvement” cautiously in your narrative writing, as it may not convey the message you intend. The examples in our book are structured according to the following two criteria:

Meets/Exceeds Expectations
Needs Improvement

Note, though, that these are categories only for ease of use. In reality, stating that performance or behavior “needs improvement” is not the same as stating that it does not meet company standards or is unsatisfactory. Similarly, documenting that “Richard has been spoken to regarding excessive absenteeism and tardiness” does not convey that his performance was unacceptable. Don’t assume that the employee understood (or a jury would agree) that just because you spoke about performance which needed improvement, it was assumed to be substandard. Instead, clearly document when performance is unacceptable, unsatisfactory, or fails to meet standards.

Fifth, you should document the efforts you’ve made to help the employee meet performance standards throughout the review period. When writing annual performance appraisals, for example, you should include the fact that you gave the employee a copy of the attendance policy, paid for her to attend a workshop on dealing with interpersonal conflict in the work place, or encouraged her to take an accounting course at a local college. Such documentation will serve as evidence that you acted responsibly by attempting to proactively rehabilitate the worker.

Finally, when documenting core competency or technical issues, expand your basic ideas by employing a “by …” format, like this:

✧ Regularly places support staff in positions of leadership by
appointing them subject matter experts in particular technical areas or by selecting them for workshop/seminar facilitator roles.

✧ Assumes responsibility for areas beyond his immediate control by preparing the monthly income statement, the comparative balance sheet, and overall general ledger maintenance.

✧ Has done very little to maintain and advance his technical knowledge and skills by upgrading his software skills, attending educational workshops, establishing a professional network of peers, or participating in professional societies.

✧ Masters all phases of the project development life cycle by identifying and documenting requirements, technical processes and procedures, test documentation, and environment and deployment plans.

✧ Successfully negotiates salary offers and preempts counteroffer possibilities by “pre-closing” and proactively engaging finalist candidates in discussions about their future career development.

✧ Ensures that newly learned skills are repeated and enforced by following up with 30, 60, and 90 day quizzes and questionnaires.

Similarly, when documenting future development goals, you could easily strengthen the clarity of your message by applying the “I expect you to … by …” format. For example, it would be simple to turn a statement like:

“In the upcoming review period, you must improve your client relations skills and better utilize your time.”

into a more instructional, future-oriented statement by applying the “I expect you to … by …” structure, which would look like this:

“I expect you to improve your client relations skills by following up with customers within two hours of their initial calls, by meeting them in their offices rather than asking them to come to yours, and by maintaining weekly contact regarding the status of their work order processing.”

Of course, the examples themselves will easily stand on their own
without the “by” predicate. Still, this structure should help to remind you to complete your thoughts and provide appropriate examples for your statements. Selectively added to the annual review at strategic points, it will add critical mass to the statements that you make and justify your perceptions. It will likewise help you clearly outline your performance expectations and how they will be concretely measured. Clarity in your written message will not only protect your company from potential outside legal challenges; it will help build a shared sense of open communication, a greater sense of partnership, and increased accountability with your workers.

A final tip to readers:

A book like this will necessarily contain overlap. When you look up a title relating to management, be sure to look under both Parts I and II in the text. Part I contains sections on the core competencies of “Leadership,” “Managerial Style,” and “Supervision,” which will surely help you crystallize your ideas. Part II, in comparison, contains specific managerial positions in the functional areas of manufacturing, operations, and sales and marketing. Be sure to cross-reference other sections of the book whenever possible.
PART I

PERFORMANCE APPRAISAL PHRASES FOR
CORE COMPETENCIES AND COMMONLY
RATED PERFORMANCE FACTORS
Adaptability and Change Management Skills

**Meets/Exceeds Expectations**

Readily identifies more efficient ways of doing business  
Maintains composure when faced with stressful situations  
Calms those around her by keeping them focused on the end goal  
Rapidly adapts to changes in the nature of his assignments  
Welcomes constructive criticism  
Shows initiative when having to redefine the way she is performing a task  
Remains a proponent of change  
Goes with the flow and adapts readily to any changes in circumstances  
Welcomes change as an opportunity  
Is a versatile team player capable of handling diverse assignments  
Demonstrates a keen ability to multi-task and juggle competing priorities  
Quickly adapts to deviation from a pre-planned schedule and course of action

**Needs Improvement**

Appears reluctant to embrace last-minute changes in direction  
Strictly adheres to only those job duties outlined in her job description  
Does not “roll with the punches” effectively  
Demonstrates a tendency to resist even minor changes  
Postpones or delays training and implementation of new programs  
Remains unwilling to carry out tasks that are “below him”  
Does not excel at independent, research-based activities  
Avoids covering for others in the department when needed  
Becomes frustrated when faced with unexpected changes in plans  
Tends to resist or resent new work assignments  
Often raises her voice and “lash out” at her peers when things don’t go
as planned
Demonstrates a time-clock mentality
Becomes flustered when interrupted or asked to deviate from a fixed schedule

**Adaptability and Change Management Goals**

Become more willing to take on duties not outlined in your job description
Learn to deal with unexpected changes in plans
Become more adaptable to any changes in your work assignments
Look for ways of using new technologies in order to increase your efficiency
Support organizational restructuring efforts in a constructive manner
Attendance and Punctuality (Reliability)

**Meets/Exceeds Expectations**

Is fully reliable in terms of attendance and punctuality
Arrives at meetings on time and well prepared
Attained perfect attendance over the review period
Had only two unplanned absences during the entire review period
Begins each day refreshed and eager to face new challenges head on
Never misses work without gaining the appropriate advance approvals
Regularly arranges for back-up temporary support when absent
Complies with all company standards of performance and conduct
Meets all attendance and tardiness standards
Is always willing to work long hours on little or no notice
Remains at her desk throughout the majority of the workday
Begins each day refreshed and eager to face new challenges
Schedules vacation requests well in advance
Begins meetings on time and ends them on schedule
Is consistently dependable and conscientious
Ensures that subordinates strictly adhere to rest and meal periods
Completes assignments accurately and meets deadlines as promised

**Needs Improvement**

Fails to assume responsibility for his actions
Does not meet standards for attendance and punctuality
Fails to follow appropriate call-in procedures during absence
Frequently arrives late to meetings while insisting that his subordinates arrive on time
Demonstrates a lack of respect for others’ time by arriving late at meetings
Allows cell phone calls to interrupt business meetings with staff and clients
Generates an excessive number of personal phone calls throughout the day
Spends excessive time handling personal matters on the Internet
Received written warnings for excessive unscheduled absenteeism
Comes and goes as he pleases, citing his “exempt” status
Does not consistently obtain advance approval for arriving late at work
Has again used the maximum number of sick days allowed
Tends to wander from his desk, leaving office phones uncovered
Does not return phone calls and e-mails in a timely manner
Continuously patterns his sick days around regularly scheduled time off

**Attendance and Punctuality Goals**

Develop a reputation for reliability and excellence in all that you do
Arrive at the office on time and ready to begin work by your scheduled start time
Speak with me in person (not by leaving voicemail message) when you need time off
Strictly adhere to all break and meal periods
Plan to arrive on time at all meetings out of respect for others’ time
Strive to attain perfect attendance
Provide medical documentation for any leaves in excess of five days
Arrange for back-up temporary support any time you are going to be out
Check with me before you leave at night to see if I need help with anything
Schedule your vacation requests well in advance of proposed leave dates
Re-read the company policy regarding punctuality and adhere to its guidelines
Do not allow outside telephone calls to interrupt your work
Avoid taking sick days up to the policy maximum
Do not wander away from your desk without informing me of your whereabouts
Avoid “patterning” your sick days around your weekends and holidays
Communication and Cooperation

Meets/Exceeds Expectations

Regularly asks for immediate feedback to ensure understanding
Remains open-minded and willing to entertain others’ ideas
Communicates clearly with customers who do not speak English fluently
Cultivates a culture of openness in information sharing
Builds consensus
Regularly solicits constructive feedback
Asks well-thought-out and well-prepared questions
Stands out among her peers as a public speaker and corporate spokesperson
Explains complicated issues clearly and succinctly
Demonstrates candor and a sense of humor in all business dealings
Possesses a knack for summarizing and communicating end results
Effectively shares highlights of conferences and workshops with her peers
Speaks persuasively and convincingly
Is not afraid to say “I don’t know” or “I’ll check on that and get back to you”
Demonstrates a willingness to hear others out before reaching a decision
Always makes others feel comfortable to participate and share their opinions
Allows subordinates to share their achievements at weekly staff meetings
Creates an inclusive work environment
Always makes others feel welcome to drop by her office or interrupt her
Acts as a calming influence when faced with anger or resentment
Holds weekly staff meetings to ensure open communication
Provides timely feedback and follow-up
Regularly conducts postmortems on failed deals and learns from his mistakes
Builds strong working relationships with other internal departments
Provides ongoing feedback in a spirit of constructive criticism
Encourages open communication, cooperation, and the sharing of knowledge

**Needs Improvement**

- Creates a territorial atmosphere
- Readily attributes blame to others
- Regularly complains of a lack of necessary resources to perform effectively
- Has difficulty distinguishing clearly between macro issues and micro details
- Tends to “foxhole” and isolate himself
- Refuses to commit her staff’s time to other departments when asked
- Has difficulty boiling down complex issues into their component parts
- Fails to communicate bad news upward
- Asks questions for questions’ sake
- Engages in shouting matches
- Uses defamatory, derogatory language to humiliate staff members
- Delays passing along bad news for fear of potential confrontation
- Is too wordy to communicate a clear and compelling message
- Remains reluctant to provide subordinates with constructive feedback
- Fails to take disciplinary actions when subordinates fail to meet expectations
- Appears unable or unwilling to say no to any request
- Prefers that others deliver bad news, even if it’s clearly her responsibility
- Makes others feel intimidated and uncomfortable when they ask for help

**Communication and Cooperation Goals**

- Cultivate a culture of openness and information sharing
- Build consensus via shared decision-making
- Ensure that your direct reports are informed of each others’ activities
- Readily admit if you’re not sure of an answer
Be conscious of your body language at all times
Manage others’ expectations appropriately
Clearly state up front if you will not be able to deliver as requested
Readily share information and resources to support business objectives
Build trust through regular, open, and honest communication
Listen and respond to others appropriately using a respectful tone
Answer incoming telephone lines within two rings
Say yes when you mean yes and no when you mean no
Do not leave callers on hold for more than 30 seconds
Proactively feed information upwards to keep management well informed
Stop others immediately from speaking to you in a derogatory tone
Refrain from using comments like “It’s not in my job description”
Be careful not to appear overwhelmed or anxious about the workload
Don’t treat coworkers who interrupt you as if they’re inconveniencing you
Always deliver bad news quickly and tactfully
Avoid blaming or censuring others publicly
Nod your head to communicate that you are actively listening
Creativity and Innovation

Meets/Exceeds Expectations

- Thinks outside the box when faced with challenging situations
- Funnels creative recommendations into practical applications
- Fosters a spirit of creative collaboration by giving teams a common focus
- Created a reporting system that is now used throughout the company
- Skillfully changes direction when faced with new information
- Solved a long-standing software glitch through a creative workaround
- Is always willing to take a fresh look at policies and practices
- Thinks of imaginative alternatives when confronted with obstacles
- Questions common practices in order to identify better ways of doing things
- Displays originality and contributes fresh ideas
- Encourages coworkers to be inventive and to take appropriate risks
- Makes ongoing suggestions to improve operations

Needs Improvement

- Demonstrates little innovation or creativity
- Tends to process information in a rote manner
- Is slow to adjust his work in light of clients’ changing needs
- Fails to give credit to subordinates who generate new ideas and solutions
- Often gets too “creative” in changing established procedures without approval
- Appears unwilling to take creative chances
- Fails to tap the creative potential of peers and subordinates
- Only initiates courses of action that have guaranteed outcomes
- Does not seek creative alternatives to conventional practices
- Is reluctant to explore new approaches or alternatives
Creativity and Innovation Goals

Seek out new ideas from others
Consistently acknowledge staff members who generate new ideas
Obtain approval before you change established procedures
Encourage creativity and independent thought among subordinates
Be willing to “think out of the box” when solving difficult problems
Customer Satisfaction

**Meets/Exceeds Expectations**

Works very well with clients as well as all staff members
Has a very warm rapport with everyone she comes in contact with
Follows up with clients to ensure no one feels forgotten or lost in the process
Clearly enjoys the “people” aspect of his position
Consistently answers the phone with a smile and a friendly hello
Readily admits when she doesn’t know the answer to a particular query
Outlines the steps that she will take to resolve a problem
Receives ongoing positive feedback from clients—both verbally and in writing
Has become the “go to guy” for clients who seek his advice to solve problems
Excels at providing timely feedback to even the most difficult customers
Consistently gains necessary approvals and authorizations
Is able easily to switch from English to Spanish and back again
Is an empathetic and focused listener
Skillfully overcomes customers’ objections
Deals with challenging customers without becoming aggressive
Has developed a loyal customer base and a high rate of repeat business
Enjoys identifying “out-of-the-box” solutions for clients with special needs
Skillfully manages all but the most challenging customer situations
Knows when to ask for additional support from team management
Is able to redefine the customer service process to meet clients’ changing needs
Overcomes objections in a logical and conversational fashion
**Needs Improvement**

Receives ongoing substandard customer satisfaction scores  
Does not manage customer expectations by explaining reasons for delays  
Has difficulty saying *no* or tactfully telling customers that they must wait their turn  
Refers too many customer queries to management for final resolution  
Has received numerous customer complaints for failing to follow up as promised  
Cannot yet demonstrate sufficient knowledge of company products  
Misses opportunities for cross-selling and overcoming initial objections  
Is unwilling to adapt his tone and personality to fit a particular caller’s style  
Argues and uses inflammatory language with customers  
Becomes frustrated when customers ask too many questions  
Displays sarcasm and alienates those looking for help  
Demonstrates condescending behavior when dealing with overly demanding callers  
Has little patience for customers with “dumb questions”

**Customer Satisfaction Goals**

Demonstrate total commitment to outstanding customer service  
Always exhibit creativity and flexibility in solving customers’ problems  
Share information and resources readily  
Make sure that clients understand that you’re on their side  
Never appear to talk down to or to patronize customers  
Exceed customers’ expectations by providing timely feedback and follow-up  
Quickly address problems even with the most demanding customers  
Effectively prioritize your workload based on your customers’ needs  
Share only as much information with a client as is necessary  
Refrain from speaking poorly of the competition  
Never permit customers to treat you disrespectfully
Involve management whenever customers behave inappropriately
Proactively inform customers of pending delays
Never use pressure to close a deal or to unduly influence a customer’s decision
Always put the client’s needs above your own
Provide objective and timely advice to customers
Tactfully tell customers no when their demands or expectations cannot be met
Follow up with customers after the conclusion of a sale
Diversity Orientation

**Meets/Exceeds Expectations**

Appreciates the diverse nature of the company’s workforce
Supports the company’s diversity mission and outreach initiatives
Encourages individuality and respect of others’ personal differences
Creates a work environment where staff can express their opinions openly
Welcomes new ideas and ways of looking at things
Appreciates the importance of workforce diversity
Welcomes differing points of view
Always treats subordinates and superiors with respect
Builds an environment of trust and openness in information sharing
Proactively identifies labor pools that could provide more diverse candidates
Reinforces the advantages of attracting and retaining a diverse workforce
Views diversity as a strategic business initiative
Recognizes the value of having our workforce reflect our diverse customer base

**Needs Improvement**

Has created a perception of potential unfairness among the ranks
Has publicly made “politically incorrect” and thoughtless statements
Has forwarded inappropriate e-mails that were offensive to others
Makes no effort to create teams that reflect the diverse workforce
Tends to make judgments based on stereotypes
Has received complaints regarding his “cliquishness” with certain subordinates
Tends to use objectionable language to or about people who are “different”
Has made numerous off-the-cuff remarks that others found offensive
Is reluctant to confront inappropriate workplace behavior
Makes no effort to understand cultural values different from her own

**Diversity Orientation Goals**

Recognize diversity as a critical business issue
Create a positive and inclusive work environment
Strive to attract and retain a diverse workforce
View diversity as a way of meeting our public mission and corporate goals
Encourage new ideas from people with different orientations
Recognize each individual’s unique contribution to the team
Treat others with respect and expect them to respond in kind
Actively recruit and develop a diverse team
Incorporate different styles, skills, and backgrounds in the people you hire
Provide ongoing career guidance and coaching to all subordinates equally
Encourage collaboration and teamwork at all times
Use the diversity outreach program to better deal with a diverse customer base
Recognize that everyone brings unique attributes and experiences to the table
Foster a sense of collaboration and joint problem solving
Goal and Objective Setting

**Meets/Exceeds Expectations**

Sets attainable goals that are compatible with staff capabilities
Ensures that stakeholders are informed of their responsibilities and deadlines
Clearly communicates specific objectives and end results to team members
Ensures that staff members understand their accountabilities and responsibilities
Establishes challenging standards that stretch the limits of his staff’s abilities
Reviews results with staff on a monthly and quarterly basis
Proactively shares results regarding her progress with her supervisors
Provides opportunities for others to rotate into key roles of responsibility
Establishes concrete performance standards
Holds himself accountable for meeting performance goals and objectives
Sets clear and measurable performance goals and objectives
Determines measurable outcomes to ensure that goals are reached
Sets aggressive targets to meet both short- and long-term business needs

**Needs Improvement**

Is inconsistent in making assignments and setting objectives
Puts too much pressure on herself to exceed objectives
Fails to prepare appropriate back-up plans or alternative resources
Provides vague instruction when staff needs more specific direction
Sets unreasonably high performance goals
Does not communicate in advance that a deadline will not be met
Leaves management feeling as if it is “flying blind” about progress
Fails to attain goals because of reluctance to delegate to her subordinates
Makes excuses and blames others when goals are not achieved
Is unwilling to assume responsibility for missed deadlines or error-prone work
Allows distractions to get in the way of reaching goals

**Goal- and Objective-Setting Goals**

Clearly communicate progress toward goals
Employ metrics to track your productivity and efficiency
Set attainable performance goals for your staff
Meet regularly with your staff to review results
Be as specific as possible when giving directions to your staff
Initiative

**Meets/Exceeds Expectations**

Consistently pursues her own professional development  
Regularly takes on responsibility for areas beyond his basic duties  
Assists other departments with special projects that arise  
Reinvents processes and redefines the workflow in light of changing needs  
Has successfully automated portions of a manual process  
Is willing to work whatever hours are necessary in order to get the job done  
Approaches clients with a can-do attitude  
Looks for creative solutions around traditional obstacles  
Assumes new responsibilities whenever the opportunity arises  
Researches outside sources and best practices to improve her knowledge  
Does not hesitate to question ways we’ve always done business  
Is typically the first in line to put newly acquired training tools to the test  
Requires little or no direction in performing day-to-day responsibilities  
Looks for what needs to be done rather than waiting to be told  
Assumes a leadership role whenever an appropriate occasion arises  
Asks for additional responsibilities whenever possible  
Is not afraid to make errors

**Needs Improvement**

Tends to demonstrate a “time clock mentality”  
Fails to assume responsibilities beyond the basic, written job description  
Often says, “That’s not how we did this at my last company”  
Discourages others from assuming broader job responsibilities  
Resists training and continues to “do things the old way”
Lacks the confidence necessary to bring about change in the department
Offers few creative suggestions or alternatives
Fails to pursue out-of-the-ordinary solutions for customers with special needs
Resists applying newly learned skills
Sometimes takes initiative too far by overstepping his authority
Fails to take advantage of available external training options
Always sticks to the tried and true
Resists picking up his pace when the tempo of the office increases
Has trouble doing her work without ongoing direction from management

**Initiative Goals**

Look for ways of adding value to your role
Reconfigure your work in light of our department’s changing needs
Don’t wait for work to come to you—go out and find it
Ask not what your company can do for you—ask what you can do for your company
Research matters thoroughly before asking for help
Keep a notebook handy with shortcuts and rules of thumb to save time
Make yourself a valuable business partner to your clients
Identify and fulfill customers’ needs on a proactive basis
Demonstrate interest in professional development opportunities
When things are slow in our area, ask for more work
Look for ways you can contribute beyond your current job description
Keep abreast of trends and changes in our business
Attend two outside workshops to further your professional development
Take advantage of our tuition reimbursement program to complete your degree
Identify ways to fill any skills gap that may exist in your resume
Self-identify areas for development and growth
Strive to become more independent in your role
Job Knowledge

Meets/Exceeds Expectations

Demonstrates a thorough knowledge of his key responsibilities
Is technically adept at all facets of her work
Regularly keeps me abreast of key developments and decisions in her area
Serves as our resident expert for administration and training
His knowledge about our company goes well beyond his area of responsibility
Regularly translates product features into benefits
Takes a “strategic business partner approach” to his work
Learns about other departments’ key initiatives
Maintains an extensive network of industry associates
Is keenly aware of key players at competitor firms
Documents common processes and steps in an internal troubleshooting guide
Shares her knowledge with her peers in the department
Spearheads seminars to cross-train others
Keeps abreast of trends and changes in her field

Needs Improvement

Has little awareness of our competitors
Fails to demonstrate appropriate forecasting ability
Has difficulty locating information when needed
Repetitively asks basic questions that she should know the answers to
Is not adequately versed in key aspects of his work
Produces more errors than someone with her experience should
Fails to demonstrate mastery of basic concepts in his area of responsibility
Produces substandard and untimely work product
Depends too readily on specific instruction from supervisors
Fails to think issues through to their logical conclusions

**Job Knowledge Goals**

Continuously develop the breath and depth of your skills
Gain a deeper understanding of your clients’ expectations
Develop goals based on your understanding of business priorities
Enroll in an extension course to enhance your skills and knowledge
Engage in rotational job shadowing exercises to learn others’ roles
Become an “issue spotter” by learning what issues are concerning your clients
Research our competitors
Study our annual report to understand relevant trends and forecasts
Review your job description to ensure you understand all aspects of your job
Find out what you need to know without asking repetitive questions
Become our department’s “go to” person for special projects
Strive to stand out among your peers in terms of job knowledge
Actively transfer your knowledge to junior staffers
Initiate departmental lunch-and-learn seminars to cross-train your staff
Sign up for internal training courses and independent study
Judgment and Decision Making

**Meets/Exceeds Expectations**
Displays sound judgment when deciding among multiple alternatives
Reaches conclusive decisions after researching alternatives thoroughly
Remains an impartial and objective evaluator of facts
Doesn’t allow his emotions to cloud his business judgment
Is decisive even in times of tight deadlines and budget constraints
Encourages her direct reports to have equal input into decision making
Remains calm in times of crisis
Avoids unnecessarily hasty decisions
Never appears to “sweat the details,” no matter how great the pressure
Appears confident and persuasive when defending his decisions
Is always able to identify the core issues at hand
Makes confident decisions once she has gathered the facts
Provides swift solutions to routine questions
Demonstrates a unique focus on results
Knows which problems require immediate solutions and which can wait
Knows when to call in additional corporate support
Is able to outline the pros and cons of alternative courses of action

**Needs Improvement**
Makes decisions without weighing alternative courses of action
Displays a conventional, unimaginative approach toward solving problems
Allows direct reports to make too many decisions without prior approval
Gets bogged down by “analysis paralysis” when forced to make decisions
Complains openly about business problems to all who will listen
Tends to use a “my way or the highway” decision-making approach
Avoids confrontation and delays decisions that could upset others
Does not consistently think through alternatives
Often responds “I haven’t thought of that” when asked basic questions
Makes no independent decisions without management’s advance blessing
Focuses more on avoiding mistakes than on thinking of creative solutions
Practices risk avoidance more than risk management
Makes inappropriate comments in public
Shares confidential information about the private affairs of coworkers
Tends to exacerbate rather than improve tense situations
Makes too many big decisions without management approval

Judgment and Decision-Making Goals

Use business knowledge to make timely and effective decisions
Demonstrate sound judgment under pressure
Use appropriate and relevant information when making decisions
Don’t get bogged down by “analysis paralysis”
Avoid making snap decisions without getting buy-in from key stakeholders
Avoid shifting responsibility for decisions to others
Remain decisive and steadfast once you have communicated a plan of action
Avoid sugarcoating disappointing news
Never exceed your authority when speaking on behalf of the company
Ask for advance permission for decisions that do not adhere to company policy
Wait to hear both sides of a story before making a decision
Give more decision-making responsibility to your subordinates
Always assume responsibility for decisions gone wrong
Make decisions that not only reflect policy but also past practice
Make more cost-effective decisions in line with the budget
Remain open to all sides of an argument before making a decision
Leadership

Meets/Exceeds Expectations

Leads by example
Places the needs of her staff above her own
Provides adequate structure, direction, and feedback to subordinates
Ensures open communication and staff camaraderie
Recognizes and rewards staff achievements
Encourages staff to assume responsibility for their actions
Listens actively
Allocates his resources appropriately in the face of competing demands
Creates a culture of mutual trust and caring
Channels strategic vision into concrete plans of action
Consistently earns respect from subordinates
Holds herself accountable for staff performance
Readily shares information and develops staff by delegating to their strengths
Provides strategic vision of future goals and objectives
Develops plans for achieving goals and objectives
Always puts others’ needs before his own
Readily assumes responsibility for her actions
Successfully manages the tactical steps needed to push a project forward
Staff would “follow him into battle” because he’s decisive and loyal
Takes appropriate risks and encourages others to do so
Makes high probability decisions even when she doesn’t have all the facts
Demonstrates high standards of ethics and fairness

Needs Improvement

Over-analyzes problems when swift decision making is needed
Confuses subordinates by sending mixed signals about goals and priorities
Fails to maintain confidential information
Fails to plan for future needs
Often flouts corporate policy and appears to march to his own drummer
Is ill prepared to debate and defend an intended course of action
Rarely shows appreciation for a job well done
Demonstrates an entitlement mentality
Appears unwilling to accommodate subordinates’ needs
Does not yet trust his instincts to lead and motivate others
Sets unreasonably high expectations for himself and others
Uses his position to dominate and intimidate others
Fails to generate enthusiasm for new projects and initiatives
Does not recognize or reward subordinates’ achievements
“Plays favorites” and does not treat people fairly
Blames others for errors and failure to meet goals

**Leadership Goals**

Strive to build alliances whenever the opportunity arises
Identify and partner with key business stakeholders
Build relationships within and across departments
Engender trust and respect among your teammates
Build support for ideas through persuasion and consensus building
Make others feel welcome to seek your advice and counsel
Learn others’ preferences and amend your style to accommodate their needs
Appreciate that things can be accomplished in many different ways
Encourage and support work-life balance for yourself and others
Volunteer for leadership opportunities in industry and charity events
Build trust through regular, open, and honest communication
Regularly assume responsibility for new projects and programs
Be willing to incur risk
Create a learning environment
Make it safe for subordinates to make mistakes and volunteer new ideas
Coach people to prepare for their next move in career progression
Lead work teams and task forces with authority and self-assurance
Ensure alignment with corporate goals through teamwork and communication
Inspire others to follow your example
Inspire a high level of trust from others
Create an environment where employees feel valued, respected, and trusted
Listening Skills

Meets/Exceeds Expectations

Demonstrates active and focused listening skills
Allows others to complete their thoughts before replying
Makes sure others “feel heard” and feel free to express their opinions
Has mastered the skill of “mirroring back” what she hears others saying
Always attempts to understand others’ points of view
Maintains eye contact and nods her head to demonstrate attention and agreement
Listens objectively and with an open mind
Waits one full second after someone finishes speaking before rebutting
Genuinely empathizes with others who have differing points of view
Actively elicits feedback even from those with opposing views
Always demonstrates a sincere interest in others’ points of view
Asks appropriate questions when unsure of instructions or directives
Accurately interprets what was said the first time
Allows others to share their thoughts and experiences without critique
Only needs to be told once
Follows directions and instructions carefully

Needs Improvement

Asks questions that show that he is not actively listening
Gets distracted by her own ideas and loses track of a conversation
Only hears what he wants to hear
Interrupts and speaks over peers
Always tries to finish others’ thoughts for them
Has developed a reputation for “having to have the last word”
Stops listening if he feels attacked or challenged
Constantly interrupts others amid thought
Loses the ability to objectively hear what is being said when criticized
Readily dismisses others’ ideas when she wants to change topics

**Listening Goals**

Become a more effective listener
Demonstrate active listening skills as a sign of respect for others
Understand how verbal interruptions damage interpersonal communication
Listen for what’s being implied as well as what’s actually being said
Avoid interrupting others
Improve the quality of your work relationships by listening more attentively
Regularly maintain eye contact with speakers
Count to two after others finish speaking before initiating a response
Practice mirroring back what you hear others say
Listen objectively even during heated negotiations
Immediately ask questions when you don’t understand something
Don’t talk out of turn
Ensure that others don’t have to repeat themselves
Managerial Style

Meets/Exceeds Expectations

Creates an inclusive work environment
Recognizes each person’s uniqueness
Models the “natural leader” paradigm
Communicates a compelling and inspired vision
Always projects the right mix of enthusiasm, strength, and energy
Treats people with respect and expect them to respond in kind
Is a calming influence in a storm
Always provides constructive feedback
Assigns tasks fairly and evenly
Maintains open and ongoing communication with her staff
Knows how to get things done through both formal and informal channels
Effectively marshals resources
Sets very high expectations of himself and his staff
Encourages and rewards team performance
Compenses for her subordinates’ weaknesses and limitations
Is looked to for direction in a crisis
Brings out the best in people
Supports fair and equal treatment
Enjoys working with and learning from others
Deals with problems head on rather than letting them fester
Is consistently fair in parceling out assignments
Has established rewards and recognition that reinforce desired outcomes
Always recognizes individual needs and skills when delegating work

Needs Improvement
Fails to set and monitor goals, targets, and mileposts
Has developed a reputation as a nonconformist
Tends to instill fear in subordinates
Typifies a “live and let live” management style that borders on apathy
Comes from the “information is power” school, where little information is shared
Is too quick to replace subordinates rather than to grow and develop them
Rarely celebrates or shares successes
Fails to adjust her approach for different audiences and situations
Provides too much negative and too little positive feedback
Avoids confrontation at all costs
Deals with staff in a heavy-handed and intimidating way
Pulls rank and overpowers others
Remains overly optimistic about staff’s abilities
Comes across as distant and aloof
Is known for having an argumentative and intimidating disposition
Tends to over-delegate and not do enough of the work herself
Is too focused on internal operations rather than the needs of customers
Concentrates on the development of few at the expense of many
Tends to give subordinates too much room for excuses
Often “hogs the work,” leaving others with little to do and her with too much
Openly challenges and confronts others who express contrary opinions
Averts face-to-face interaction and relies on e-mail instead

**Managerial Style Goals**

Work through conflict and ensure productive resolution
Confront and address inappropriate behavior immediately
Build trust at every opportunity
Develop a more collegial relationship with your direct reports
Make others feel welcome to seek your advice and counsel
Practice random acts of kindness with subordinates
“Catch” people being good
Demonstrate effective decision-making and problem-solving skills
Discourage subordinates from unfounded speculation about private matters
Remain consistent in your interpretation and application of company policy
Avoid feeding the “corporate grapevine” with unfounded facts or rumors
Communicate in advance any potential deviations from standard procedures
Motivate others to be their best and strive to bring out the best in them
Maintain confidentiality of private or sensitive information
Regularly ask others for and openly provide feedback
Create a culture of open information sharing and increased accountability
Seek public speaking opportunities to develop your presentation skills
Make it safe to volunteer differing points of view
Oral and Written Expression

**Meets/Exceeds Expectations**

Speaks clearly and confidently without hesitation  
Addresses others in an open fashion  
Is totally at ease when addressing a large audience  
Allows others to complete their thoughts before countering their arguments  
Acknowledges others’ points of view  
Never has a bad thing to say about anyone  
Always has a smile on her face  
Articulates her thoughts clearly and logically  
Constructs compelling arguments  
Is effective at saying no respectfully but firmly  
Uses clear and simple language  
Her correspondence never gets bogged down in unnecessary detail  
Is careful not to speak over her audience  
Composes correspondence that is brief, well structured, and error free  
Creates useful spreadsheets for capturing and filtering large amounts of data  
Documents complex ideas in a user-friendly fashion  
Keeps all written memos to one page  
Uses bulleted formats that clearly capture an issue’s salient points  
Writes clear and persuasive memos  
Creates and uses compelling PowerPoint slides to amplify presentation  
Debates skillfully and convincingly and “holds his own” very well

**Needs Improvement**

Speaks too quickly and appears to ramble at times
Quickly loses her audience  
Suffers from a fear of public speaking  
Sometimes “whines” and weakens the value of his spoken message  
Commits confidential information to e-mail  
Fails to synthesize key points in his writing  
Allows excessive narratives to distract from his written message  
Fails to use spell check and other electronic tools  
Publishes memos with spelling and grammatical errors  
Tends not to stick to the point in her writing  
Does not check memos for errors before distributing them  
Tends to back down and acquiesce whenever openly challenged  
Hesitates to verbally defend her stated position  
Writes excessively long memos that make it difficult to crystallize key points  
Overuses boldface and exclamation marks in his memos  
Lacks a basic mastery of business writing techniques  
Fails to record edits and changes in the redlining process  

**Oral and Written Expression Goals**

Write to express, not to impress  
Write succinctly  
Use no more than three bullets to capture the essence of your message  
Purchase and read a book on grammar to help you keep memos error free  
Begin your memos with your conclusion or ultimate recommendation  
Consistently use the spell-check feature before sending e-mails to others  
Structure your ideas neatly into paragraphs  
Use simple language that is clear and concise  
Write in a natural, conversational style  
Employ executive summaries to present your key points and ideas  
Keep proposals to one page whenever possible  
Don’t “shout” when you write by using too many exclamation marks  
Always ask questions to confirm your understanding  
Connect with your audience by walking around the room
Refrain from using sarcasm
Never appear to whine or complain about matters beyond your control
Use a bulleted format to structure e-mail messages succinctly
Avoid providing too much detail
Count to two after someone finishes speaking so as not to interrupt them
Paraphrase what you hear someone saying to confirm your understanding
Organization and Planning Skills

Meets/Exceeds Expectations

Displays excellent organization and planning skills
Takes a methodical and consistent approach toward organizing her work
Locates back-up information quickly
Plans, organizes, and completes tasks in an acceptable time frame
Readily adheres to deadlines and production benchmarks
Maintains a very neat and well-organized working environment
Will not leave to go home at night unless everything is put away in its place
Develops practical alternatives to various “what if” scenarios
Has created a processing system that allows coworkers to step in during his absence
Demonstrates a well-honed ability to forecast potential problems and pitfalls
Always plans tomorrow’s goals before he leaves the office
Consistently relies on a PDA to keep fully informed of her calendar
Manages multiple tasks effectively
Documents repetitive tasks
Files documents immediately upon receipt
Is very effective in anticipating bottlenecks
Duly considers the possible outcomes of a particular course of action
Proposes strategies and tactics that are concrete and definitive
Anticipates potential areas of growth for our core product lines
Is highly proficient in anticipating resource needs
Always creates various “what if” scenarios to counter contingencies
Prepares her assignments in a systematic and orderly fashion
Never appears to be overwhelmed by the sheer volume of work
Needs Improvement

Has difficulty planning a course of action without specific instruction
Does not plan ahead
Fails to head off minor problems before they become major impediments
Does not communicate when he requires additional support or assistance
Has difficulty translating theoretical ideas into tactical action plans
Demonstrates a reactive, “management by crisis” style
Has difficulty keeping two steps ahead of his current project load
Gets lost in a myriad of details
Quickly loses sight of the bigger picture
Does not consistently tie up loose ends and wrap up projects cleanly
Fails to plan for and follow through with detail work
Consistently fails to plan for the unexpected
Does not make contingency plans should initial assumptions prove wrong
Tends to over-commit her time
Is inconsistent in tracking incoming statements and records
Fails to consult with other stakeholders when planning a large-scale project
Does not conduct proper needs assessments in the preplanning stage
Appears overwhelmed and disorganized despite years of tenure in this role

Organization and Planning Goals

Plan your work and work your plan
Become a more effective goal setter
Prepare contingency and alternative plans
Understand and implement the key benefits of organization and planning
Identify and address organizational needs
Rely on a daily planner to block periods of time for particular tasks
Do not over-commit your time or resources
Ensure that you don’t allow last-minute interruptions to get in your way
Automate several of the paper-intensive tasks on your desk
Strengthen your forecasting ability
Maintain a workspace that is free and clear of clutter
Dedicate one hour per week to thinning the outstanding reports on your desk
Plan for the appropriate level of resources when undertaking a new project
Avoid scheduling conflicts
Focus on both short- and long-term plans
Don’t get discouraged by unexpected delays
Establish both strategic and tactical planning goals
Translate goals into concrete action plans
Always plan for the unexpected
Personal Style

**Meets/Exceeds Expectations**

Willingly accepts constructive criticism
Always displays a high level of enthusiasm, humor, and spontaneity
Consistently looks for ways of improving performance
Respects others’ differences
Encourages openness in information sharing
“Lives to work” rather than “works to live”
Displays a genuine appreciation for her job
Always has a “can do” attitude
Demonstrates a keen eye for detail
Works well in a large bureaucratic system
Always exudes a high level of self-confidence
Respects both the letter and the spirit of company policies
Uses diplomacy and tact in dealing with staff and clients
Likes neatness and order at work
Has a well-deserved reputation for accuracy and completeness
Effectively diffuses high tension situations
Demonstrates selflessness in putting others’ needs before his own
Analyzes successes and failures for clues to improvement
Serves as an excellent source of institutional knowledge
Builds constructive and supportive relationships with peers
Does not let personal disagreements interfere with the work at hand
Asks insightful and penetrating questions
Exemplifies commitment, discipline, and a solid work ethic
Demonstrates patience when confronted with organizational shortcomings
Sees how things can be done rather than why they can’t be done
Uses humor to ease tension
Is able to acknowledge her own shortcomings
Goes the extra mile to put others at ease  
Demonstrates a high level of energy, drive, and determination  
Is sought out by others for advice and counsel

**Needs Improvement**

Prefers to work alone  
Often uses sarcastic and offensive humor  
Takes rejection too personally  
Is too hard on herself  
Has a reputation for being cynical and moody  
Prefers to keep others at arms’ length  
Gets mired in minutia and tedious detail  
Over-relied on his engaging personality rather than substantive work  
Tends to pit individuals against one another  
Engages in rumors and talks behind people’s backs  
Doesn’t know when to confront and when to hold back  
Takes criticism as a personal affront and becomes very defensive  
Antagonizes others by showing a superior attitude  
Often lets her anger, frustration, and anxiety show  
Tends to be hypercritical of others  
Appears to be stuck in a comfort zone and won’t take risk  
Tends to make excuses rather than dealing with problems head on  
Has developed a reputation for being a complainer and whiner  
Has difficulty turning theoretical vision into workable practice  
Gets sidetracked as soon as a more exciting challenge comes along  
Flits from activity to activity without tying up loose ends  
Readily assigns blame to others  
Has a penchant for overcomplicating matters  
Makes inappropriate and offensive comments and gestures  
Often is too free with confidential information  
Lets things fall through the cracks  
Sometimes seeks change for change’s sake
Rationalizes away mistakes

**Personal Style Goals**

Become more comfortable dealing with authority
Always remain in control even in the face of urgent deadlines
Avoid becoming frustrated by your own or others’ shortcomings
Pick up on social cues and learn to read people accurately
Learn to say *no* forcefully rather than passing tasks up the line
Allow others to finish their thoughts before rebutting their arguments
Become more effective at managing others’ expectations
Never get personally involved in others’ conflicts
Design three development goals that you know you can achieve
Make conscious effort to “lighten up” your style
Assume responsibility for a problem rather than blaming others
Become a more positive influence on coworkers
Accept the challenge of change in a dynamic environment
Become more proficient in the use of new technology
Learn to plan instead of flying by the seat of your pants
Become more efficient at drafting documents and proposals
Produce results without getting bogged down in red tape
Be patient when dealing with crises and chaos
Pick your battles wisely
Learn to laugh more
Be willing to take risks
Never resent requests to do something outside of your normal duties
Remain flexible when faced with last-minute changes in plan
Take constructive criticism in stride and avoid appearing defensive
Serve as a role model of service and professionalism
Remain productive and results-oriented
Model an appropriate sense of urgency
Practice multitasking rather than performing “one task at a time”
Problem-Solving Skills and Results Orientation

**Meets/Exceeds Expectations**

Successfully identifies, analyzes, and solves problems
Approaches problems in a positive manner
Views impediments as solvable challenges
Shows patience in dealing with complex and time-consuming issues
Willingly shares knowledge so that others don’t have to reinvent the wheel
Identifies practical solutions
Clearly explains options and solutions to end-users
Breaks down obstacles into their component parts
Resolves issues in a timely manner
Addresses problem issues head on in a proactive fashion
Analyzes possible obstacles in order to identify solutions
Maintains an open dialogue with clients who are having technical problems
Always recommends at least two solutions to every problem
Keeps supervisors apprised of status changes and requests for resources
Is able to diagnose complex problems and reach sustainable solutions

**Needs Improvement**

Fails to recognize repetitive trends in recurring problems
Becomes unnerved when dealing with demanding customers
Approaches problems in a linear fashion, solving only one matter at a time
Fails to provide multiple solutions or to demonstrate lateral thinking skills
Has difficulty troubleshooting basic user questions
Suffers from information overload when resolving complex tasks
Excessively bothers her peers with questions about basic matters
Sometimes misses the practical first step in diagnosing a problem
Often cannot distinguish between core problems and secondary symptoms
Fails to provide staff with the appropriate amount of structure and direction
Appears overwhelmed when faced with multiple problems
Does not make adequate use of online support tools
Does not seem to learn from past mistakes

**Problem-Solving Goals**

Learn to anticipate problems in advance
View obstacles as challenging problems that can be solved
Be a problem solver rather than a complainer
Effectively distinguish between the causes and the symptoms of problems
Become adept at juggling multiple priorities under time constraints
Productivity and Volume

Meets/Exceeds Expectations

Consistently meets or exceeds productivity targets
Regularly completes work ahead of schedule
Constantly finds the right balance between volume and quality
Encourages others to exceed our department’s monthly goals
Does not sacrifice quality for volume
Is recognized as a consistent top producer
Readily tackles new projects that require a substantial investment of time
Maintains unusually high output
Sustains peak performance
Uses quarterly staff meetings to review annual development goals
Volunteers for assignments beyond normal work hours
Prides himself on his well-deserved reputation as a “volume hound”
Constantly exceeds targeted benchmarks
Employs metrics to measure and maximize her group’s productivity
Breaks production records
Generates minimal product returns
Measures results through established metrics and analytical benchmarks
Diagnoses problems that impede productivity

Needs Improvement

Remains inconsistent in reaching monthly performance targets
Commits excessive input errors
Experiences a higher than average scrap rate
Does not consistently meet output benchmarks
Exhibits only superficial product knowledge
Lacks troubleshooting abilities
Does not look beyond her job description for ways to increase productivity
Fails to encourage cooperation and collaboration from other departments
Processes a low volume of work relative to her peers
Continues to make mistakes despite ongoing training efforts
Has been unable to avoid staff burnout
Appears sleepy and unfocused throughout the morning

**Productivity and Volume Goals**

Increase both the volume and quality of your work
Overcome internal barriers to productivity
Learn how to manage frequent interruptions
Discipline yourself to plan your work and work your plan
Enhance your overall reliability
Meet attendance and punctuality goals without exception
Promote innovation and creativity in your group
Conduct a postmortem of any failed project to learn from mistakes
Set monthly goals and track progress on a weekly or daily basis
Ensure maximum participation in staff meetings
Keep focused whenever unexpected events play havoc with best-laid plans
Streamline work processes and increase efficiency
Hold weekly meetings to ensure that staff members communicate openly
Identify risks before accepting assignments
Ensure that you have the necessary manpower and resources in place
Gain perspective on any potential productivity deficiencies
Professionalism and Grooming/Appearance

**Meets/Exceeds Expectations**

Maintains a professional appearance in dress and manner  
Always has a smile and a friendly “How are you” to share with others  
Represents our company well at all off-site meetings  
Readily adheres to the company dress policy  
Is always direct and honest when dealing with others  
Motivates team members, always leading by example  
Demonstrates professional expertise in all that she does  
Consistently acts within company guidelines  
Makes compelling, organized presentations  
Adheres to a traditional code of honor and respect for others  
Places others’ needs before her own  
“Walks the talk”—his actions are always consistent with his word  
Always justifies exceptions to policies and past practices  
Remains calm and focused in high-stress situations  
Welcomes constructive feedback from peers and staff  
Treats people with dignity and respect at all times  
Avoids using inappropriate jargon or idioms

**Needs Improvement**

Does not project an image of professionalism  
Is inconsistent in enforcing company policies and procedures  
Is often disrespectful and unfair in dealing with subordinates  
Fails to display an acceptable standard of grooming  
Is inconsistent in following ethical business practices  
Fails to meet personal hygiene standards
Tends to use overly familiar terms like kiddo or buddy
Fails to take steps to strengthen the overall impression she makes
Often arrives at work with uncombed hair and in wrinkled clothes
Has not taken responsibility for his own career development
Lets past differences interfere with her teamwork
Feeds the corporate grapevine with unsubstantiated facts
Fails to pick her battles wisely
Alienates clients by engaging in thoughtless gossip
Challenges others with baseless claims

Professionalism Goals

Establish immediate credibility
Inspire and motivate those around you to perform at their best
Demonstrate vision, ambition, persistence, and a passion to succeed
Project a positive self-image
Always exude self-confidence and inspire confidence in others
Dress the part in order to create an initial impression of success
Display the highest level of personal integrity
Demonstrate best practices in all that you do
Treat others with dignity and respect at all times
Maintain composure and professionalism when faced with crises
Support a more inclusive and positive work environment
Insist that staff members meet standards of grooming and appearance
Maintain confidentiality and respect for others’ private affairs
Create an image of professionalism and class in all that you do
Respect and follow company policies and procedures
Treat others with respect and fairness and expect them to respond in kind
Follow ethical business practices at all times and tolerate no exceptions
Quality

**Meets/Exceeds Expectations**

- Displays pride in his work
- Ensures that the finished product is always of the highest quality
- Is willing to sacrifice speed for accuracy
- Ensures that any document that leaves her desk will be error free
- Refuses to sacrifice quality for volume
- Makes a documented record of final outcomes and resolutions
- Recommends quality enhancements to customers
- Prepares handouts and presentation materials in a meticulous fashion
- Receives letters of recommendation from satisfied customers
- Detects flaws in raw materials
- Remains committed to continuous process improvement
- Employs measurement tools that increase efficiency and reduce costs
- Consistently “dots the i’s and crosses the t’s”

**Needs Improvement**

- Tends to get bogged down in “analysis paralysis”
- Confuses minor details with the overall purpose of a project
- Has been criticized for doing “too thorough a job”
- His handwriting is too sloppy to decipher messages accurately
- Gets easily side-tracked during routine tasks
- Her error rates exceed acceptable thresholds
- Fails to take notes of dates and timelines
- Misplaces important materials
- Fails to obtain approval before making changes in established procedures
- Tends to misplace paperwork
Quality of work is below departmental performance standards

**Quality Goals**

Keep better track of due dates and timelines  
Become more consistently aware of quality guidelines  
Avoid getting bogged down in minor details  
Become more proficient in using technology to increase efficiency  
Learn to rely more on documentation than on your memory
Resourcefulness

**Meets/Exceeds Expectations**

Has developed a network of useful contacts at competitor companies
Knows whom to contact within the company for various needs
Never complains of a lack of resources
Consistently anticipates when and what additional resources may be needed
Takes advantage of shared corporate resources
Achieves economies of scale
Always looks for ways of improving the way we get things done
Has repeatedly introduced cost-saving measures
Takes advantage of free seminars and programs
Allocates resources wisely
Achieves success despite limited organizational resources
Consistently comes in at or under budget
Is able to meet targets without need for additional staff

**Needs Improvement**

Often underestimates the resources needed for upcoming projects
Has a reputation for hoarding resources
Has trouble remaining within budget
Does not optimize available resources
Resists adjusting his job in light of the department’s changing needs
Fails to allocate resources wisely
Makes unreasonable and unjustifiable requests for additional resources
Is reluctant to ask questions when she’s not sure of how to do something
Fails to make adequate use of routine office technology
**Resourcefulness Goals**

Research and identify time-saving resources
Plan for unforeseen expenses and contingencies
Make better use of existing corporate and departmental resources
Use technology to better track performance against budget
Develop alternative solutions for dealing with last-minute changes in plan
Safety

**Meets/Exceeds Expectations**

Adheres to all company safety and security policies and regulations  
Remains aware of and reports potential safety hazards  
Complies with all safety recommendations, postings, and requirements  
Consistently provides emergency training to staff  
Duly familiarizes himself with safety instruments and resources  
Disciplines workers who fail to wear appropriate safety gear  
Keeps abreast of industry best practices regarding workplace security  
Minimizes workplace injury and illness occurrences  
Consistently maintains a record of zero safety infractions  
Ensures compliance of staff with company safety programs  
Is familiar with and enforces OSHA regulations  
Prepares cost-benefit analyses of available security systems  
Monitors visitors, suppliers, and vendors to ensure a safe workplace  
Reports enterprise-wide safety concerns to local authorities  
Leads disaster drills and emergency evacuation planning exercises  
Provides safety and security training during new hire orientation  
Manages the business continuity planning and disaster recovery programs  
Has an excellent personal safety record  
His team has a track record of zero safety infractions in the last two years  
Regularly publicizes available safety awards and incentives

**Needs Improvement**

Fails to document potential safety hazards  
Does not adhere to environmental safety and health practices  
Fails to wear the appropriate safety gear on the shop floor
Often arrives at work without the appropriate safety gear
Has operated machinery without being fully trained to do so
Fails to maintain equipment as per manufacturer’s specifications
Fails to keep current on security procedures
Is unable to account for a recent increase in worker injury rates
Is unfamiliar with key statistics for injury types or occurrences
Has failed to take steps to resolve pending hazards in a timely fashion
Does not maintain machinery in compliance with safety manual guidelines
Unnecessarily sacrifices safety for productivity
Fails to strictly enforce environmental regulations

**Safety Goals**

Recommend effective safety enhancements and corrective actions
Always comply with all safety policies and procedures
Report potential safety hazards immediately
Ensure that your equipment is in proper working order before initiating work
Stringently follow all recommendations outlined in material safety data sheets
Train staff members in hazardous materials (HAZMAT) procedures
Cordon off areas that pose serious safety risks
Request an ergonomic assessment of your work area
Always leave your work area clean and functional at the end of the shift
Communicate any potential malfunctioning equipment at shift change
Maintain your personal tools in proper working order
Regularly respond to inspection queries
Cooperate with safety investigations and audit requests
Follow recommended hygiene practices without exception
Maintain required licenses and certifications in good order
Continuously monitor and evaluate environmental and safety data
Provide technical and regulatory compliance support
Never sacrifice safety for productivity
Insist on a “zero tolerance” policy toward safety infractions
Staff Development

Meets/Exceeds Expectations

Readily shares her expertise with staff in order to develop their skills
Makes it safe for staff members to make mistakes and think outside the box
Actively works to identify potential talent gaps in her organization
Remains committed to succession planning
Rotates assignments and uses job shadowing to strengthen staff skills
Encourages staff to develop their professional skills
Ensures that subordinates identify goals and measurable outcomes
Contributes to subordinates’ annual development plans
Regularly places support staff in positions of leadership
Demonstrates appreciation of staff contributions and achievements
Allows key subordinates to make presentations on her behalf
Finds ways to publicly recognize individual achievements
Ensures that mistakes become learning opportunities
Creates an environment of trust and camaraderie
Delegates key responsibilities to subordinates on a rotational basis
Encourages his direct reports to lead staff meetings
Allows employees to find new ways of contributing to work
Promotes the benefits of a diverse workforce
Encourages cross-training, job shadowing, and rotational assignments

Needs Improvement

Does not trust his staff to function independently
Is always too defensive of her people
Overcompensates for staff weaknesses
Tends to delegate only mundane and repetitive tasks
Refuses to accept different points of view from subordinates
Resists placing subordinates into roles of leadership
Intimidates and alienates others and squelches individuality
Fails to create mentoring opportunities for her key performers
Has not mastered the basics of effective delegation
Is unsuccessful in developing group camaraderie
Has been accused of playing favorites with certain subordinates
Has created an environment where team members cannot motivate themselves

**Staff Development Goals**

Provide active feedback and encouragement
Provide career guidance and coaching to staff
View delegation as the key to staff development and succession planning
Recognize each individual’s unique contribution to the team
Ensure that employees continuously develop their breadth and depth of skills
Carefully monitor what you have delegated
Delegate what you’re good at
Ensure that your subordinates learn from your key strengths
Regularly ask employees what new responsibilities they’d like to assume
Place staff members in position to spearhead key initiatives
Assume the role of mentor and coach
Help your staff members prepare for their next move in career progression
Allow subordinates the opportunity to assume greater responsibilities
Recognize individual needs and skills when delegating work
Assign staff to rotational assignments and cross-training
Foster a greater understanding of others’ roles in the organization
Identify your successor
Provide more structure, feedback, and direction to your group
Ensure that subordinates understand their limits and boundaries
Strategic and Critical Thinking Skills

**Meets/Exceeds Expectations**

Strategically contributes to departmental initiatives
Identifies unique ways of creating value
Realigns work processes in accordance with available resources
Has exceptional reasoning and analysis skills
Thinks through the consequences of recommended courses of action
Thoroughly researches options in terms of risks and consequences
Displays organizational forecasting ability and intuitive insight
Considers both the strategic and tactical aspects of decisions
Always assesses the benefits and consequences of a course of action
Processes information in a disciplined and structured manner
Keeps abreast of competitors’ best practices and innovative solutions
Trains others to think long-term
Writes clear and concise proposals for new systems or procedures
Compares departmental performance to industry benchmarks
Measures internal operations using metrics and analytics
Displays both natural inquisitiveness and analytical reasoning skills
Creates accurate forecasts and models
Uses metrics to project budget variances and potential cost overruns
Formulates opinions based on sound mathematical calculations
Strategically partners with management

**Needs Improvement**

Responds emotionally to critical situations rather than analytically
Avoids any approach or solution that deviates from past practice
Fails to assess issues from a strategic vantage point
Does not approach problem solving in a methodical and logical fashion
Does not consistently avail himself of existing technology
Deals with the symptoms of a problem rather than its underlying causes
Fails to draw sound conclusions
Gives little thought to how decisions might affect other departments
Does not appreciate her own department’s capabilities and limitations
Fails to think through the strategic impact of his recommendations
Does not understand our clients’ business drivers and trends
Is uncomfortable applying proven methodologies in reaching decisions
Fails to demonstrate sound analytical reasoning abilities

**Strategic and Critical Thinking Goals**

Learn to distinguish between strategic and tactical thinking
Define and communicate the vision for the department
Develop strategies that reflect our business priorities
Translate strategies into objectives and action plans
Gain a deeper understanding of the roles and expectations of our clients
Strengthen your analytical and critical thinking skills
Balance strategic with tactical priorities
Identify significant business trends and patterns
Learn your customers’ businesses inside and out
Become a subject matter expert
Routinely request “sneak peeks” into your clients’ business challenges
Keep in sync with your clients’ timelines and priorities
Understand how our company makes and spends money
Study our annual report to discern activities, trends, and future plans
**Supervision**

**Meets/Exceeds Expectations**

Sets clear guidelines and expectations for immediate subordinates  
Provides the appropriate amount of structure, direction, and feedback  
Confronts problem situations head-on  
Uses a direct yet caring approach  
Clearly communicates roles and job expectations  
Regularly meets one-on-one with staff to show interest in their progress  
Outlines action steps and deadlines necessary to reach goals  
Commits individual action plans to paper  
Regularly measures progress  
Ensures that deliverables are achieved  
Maintains ongoing and open communication with subordinates  
Practices MBWA—Management by Walking Around  
Holds regular weekly staff meetings  
Readily assumes responsibility for errors  
Encourages her staff to use the employee assistance program  
Creates an environment where employees can motivate themselves  
Practices a consensus-building rather than autocratic managerial style

**Needs Improvement**

Allows interpersonal conflict among subordinates to fester  
Fails to establish realistic work demands  
Rarely recognizes or appreciates exceptional performance  
Does not proactively address poor staff performance  
Fails to address situations before they become major conflicts  
Works behind closed doors too often
Is reluctant to provide coaching to direct reports
Appears inaccessible
Allows staff members work long hours of unscheduled overtime
Knows little of what’s going on outside his office
Fails to follow up on subordinates’ projects
Adheres to a “My Way or the Highway” supervisory style

**Supervision Goals**

Clearly communicate roles and job expectations
Set clear and measurable performance goals and objectives
Inspire employees to take ownership for their performance improvement
Communicate how individual goals align with organizational objectives
Define “stretch goals” to encourage staff members to think outside the box
Continuously monitor performance
Address problematic performance early on
Encourage open and honest communication
Regularly communicate expectations
Define, direct, and delegate work in a more flexible manner
Effectively prioritize the workload based on current business needs
Regularly give and receive performance feedback
Prioritize the workload with more forethought
Complete annual performance appraisals on a timelier basis
Consistently monitor subordinates’ job performance and areas for improvement
Allocate resources more effectively
Be more creative in rewarding and recognizing good work
Teamwork and Relationship-Building Skills

Meets/Exceeds Expectations

Encourages group cooperation and participation
Builds effective teams
Capitalizes on the talents of team members
Promotes participants into leadership roles
Draws on the strengths of team members
Allows individuals to volunteer in their areas of interest
Treats no suggestion or request as trivial or minor
Shares the glory of success
Treats people with dignity and respect
Successfully builds bridges based on trust and open communication
Provides encouragement when constructive criticism is necessary
Creates strong teams with successful outcomes
Ensures that team members feel united in reaching a common goal
Is very effective in organizing team meetings
Consistently brings out the best in others
Resolves team conflict without drama or histrionics
Attributes achievements to team effort
Insists on mutual respect publicly while resolving problems one-on-one
Encourages open debate and sharing of ideas

Needs Improvement

Clearly prefers to work solo
Attempts to avoid group-related assignments
Is inconsistent in how she allocates tasks to team members
Tends to hog information and resources
Allows team members to get easily sidetracked
Does not encourage or support others who are facing challenges
Fails to interact with the team on a collegial or social basis
Does not readily give credit where credit is due
Tends to “cherry pick” the more appealing assignments
Discourages coworkers from volunteering ideas
Shoots down untested suggestions and recommendations
Demonstrates a domineering work style that puts others off
Has taken credit for other team members’ contributions
Becomes antagonistic when her authority is challenged
Engages in public shouting matches when he doesn’t get his way
“Talks over” those with conflicting opinions
Has difficulty maintaining confidences

**Teamwork and Relationship-Building Goals**

Build and lead effective teams
Develop high-performance teams
Use hands-on coaching and positive reinforcement to create camaraderie
Regularly monitor team progress
Provide training to enhance team effectiveness
Encourage subordinates to assume key leadership roles
Hold teams accountable for meeting performance goals and objectives
Take appropriate action to address substandard group performance
Consistently reward and recognize collective efforts
Empower teams to embrace and capitalize on change opportunities
Look for ways to create cross-functional teams to boost productivity
Foster a sense of shared responsibility
Set and communicate team vision
Provide constructive feedback regarding group accountability
Draw on the strengths of individual contributors
Strengthen your reputation as a team player
Develop skills for resolving disruptive conflict among team members
Technical Skills

Meets/Exceeds Expectations

- Demonstrates mastery of technical tools and methodologies
- Excels at documenting necessary steps and incremental outcomes
- Creates results that could be easily replicated
- Makes effective use of advanced software tools
- Follows the Six Sigma guidelines for controlling business processes
- Focuses on increasing efficiency, raising productivity, and reducing costs
- Keeps abreast of the latest in office technology
- Uses statistical techniques and a methodical approach to solve problems
- Adapts well to changes in technology
- Actively surfs the Internet for product upgrades and security patches
- Effectively analyzes data on a problem-to-solution level
- Makes efficient use of technical support
- Consistently inputs data with an accuracy rate of 95 percent or better
- Provides well-supported reasoning for technical recommendations
- Maintains technical and professional certifications
- Combines advanced technical know-how with solid communication skills

Needs Improvement

- Lacks a sound methodology for diagnosing repetitive problems
- Resists using newly acquired software
- Is slow to switch from paper-based to automated systems
- Fails to apply and practice what he learned in his recent training course
- Has allowed her current license to lapse
- Cannot demonstrate basic mastery of newly installed software
- Resists documenting the steps necessary to repeat a procedure
Lacks the know-how to diagnose and repair basic systems problems
Fails to take advantage of training to enhance her technical skills
Demonstrates only basic technical skills when advanced knowledge is needed
Is not sufficiently knowledgeable about relevant software tools
Lacks sufficient technical competence to generate confidence from clients

**Technical Skills Goals**

- Improve your technical documentation skills
- Keep current on changing technologies and trends
- Translate technical jargon into user-friendly information
- Promote new technology as a way to increase efficiency and reduce costs
- Demonstrate a thorough understanding of the technical aspects of the job
- Look for creative ways to apply technology to job tasks
- Complete new system training within the next thirty days
- Use the online tutorial to master spreadsheet basics
- Acquire your professional certification within the next year
- Overcome your resistance to newly introduced technology
- Automate the paper-based systems currently in use
- Learn to operate shop machinery more efficiently
- Train end users so that they can apply new software effectively
- Retrain in areas where you have become rusty
- Incorporate the newest technologies into your work
Time Management

Meets/Exceeds Expectations

Consistently approaches his workload in a proactive fashion
Allocates time according to the peaks and valleys of the production cycle
Does not allow distractions or obstacles to get in the way of meeting deadlines
Plans daily activities regularly at 8 am using a daily planner
Ensures that her day is planned as productively as possible
Excels in pushing projects forward despite bureaucratic slowdowns
Syncs PC calendar with personal digital assistant (PDA) to stay on time
Regularly projects specific timetables along with “next steps”
Ensures a consistent workflow despite interruptions
Effectively manages multiple projects rather than one project at a time
Holds his staff accountable for beginning work on time
Sets realistic time frames
Is very reliable at estimating the time necessary to complete tasks
Uses a daily planner to keep herself organized and on time
Delivers product within promised guidelines
Maintains a neat and organized workplace
Handles interruptions well
Effectively allocates time and resources to meet contractual deadlines
Readily maintains key information at his fingertips

Needs Improvement

Gets easily sidetracked and wastes time
Lacks a disciplined approach to time management
Fails to block her day into effective quadrants
Often arrives late and unprepared to staff meetings
Has difficulty accounting for how he spends his time  
Asks repetitive questions  
Appears overwhelmed at peak time periods  
Fails to make use of available technology to automate manual processes  
Appears to wander through the workday without much direction or purpose  
Is frequently disorganized  
Fails to follow meeting schedule start times  
Allows meetings to drift  
Appears overwhelmed by an average workload  
Always appears busy but has little to show for his efforts  
Procrastinates whenever a new project must be initiated  
Does not pace herself effectively through periods of peak and low activity  
Spends too much time away from his desk

**Time Management Goals**

Take a course on effective time management techniques  
Pace yourself to avoid burnout  
Demonstrate respect of others’ time  
Consistently meet or beat deadlines  
Manage your time and resources more efficiently  
Prioritize tasks according to the degree of current urgency  
Weed out and eliminate time wasters  
Don’t put off to tomorrow what you can do today  
Handle higher priority tasks first while maintaining progress on others  
Juggle competing priorities more effectively  
Keep presentations focused on key agenda items  
Take the time to analyze the effectiveness of the meetings you lead  
Structure your day into incremental activities  
Set aside time to focus on your work without external interruption  
Screen callers more thoroughly and qualify the purpose of their calls  
Arrive at all staff meetings on time and prepared
PART II PERFORMANCE APPRAISAL
PHRASES FOR PARTICULAR TITLES AND
ROLES
Accounting and Finance

Accountant

Meets/Exceeds Expectations

Coordinates a high volume of financial data
Excels in a very diverse accounting environment
Answers accounting procedural questions with authority
Interprets the significance behind the numbers
Excels at researching and analyzing financial data
Thoroughly prepares accounting reports and summaries
Completes monthly and quarterly reports on time and error free
Summarizes financial data and tracks trends accurately
Processes a high volume of invoices for payment
Effectively audits his own work
Demonstrates a keen eye for numerical detail
Accurately logs monthly journal entries into the mainframe system
Substantiates financial transactions with clear documentation
Thoroughly reconciles financial discrepancies and variances
Brings significant financial issues to management’s immediate attention
Demonstrates broad mastery of appropriate accounting functions
Accurately tracks P&L statements, balance sheets, and other key metrics

Needs Improvement

Fails to maintain accurate financial records and files
Lacks knowledge of generally accepted accounting principles
Shows resistance when asked to customize ad hoc financial reports
Does not consistently follow internal controls
Fails to gain necessary signature approvals for budget variances
Does not consistently complete database backups at appropriate intervals
Fails to research and resolve accounting discrepancies
Fails to approve invoices in a timely manner
Requires ongoing confirmation of repetitive transactional tasks
Exercises little discretion in interpreting financial data
Has failed to maintain confidential financial information
Lacks the necessary software skills to perform at an acceptable level
Auditor

Meets/Exceeds Expectations

Ensures asset protection
Develops and monitors internal control policies and procedures
Documents any shortcomings in the internal financial control system
Skillfully audits internal compliance issues
Thoroughly examines and documents operating practices
Composes audit questionnaires for data security and disaster recovery
Has jumped at the opportunity to receive Sarbanes-Oxley compliance training
Excels at flowcharting business processes and related internal controls
Drives plans for process improvement
Communicates audit findings in a timely manner
Has developed and performed relevant test audits
Readily identifies mitigating and compensating types of controls

Needs Improvement

Fails to consistently perform follow-up audits
Fails to evaluate the status of agreed-upon recommendations
Does not plan and complete audits within established time frames
Lacks the ability to step back from details and see the “big picture”
Does not consistently document and evaluate audit results
Shows a general unwillingness to travel
Bookkeeper

Meets/Exceeds Expectations

Orchestrates a high volume of financial transactions
Accurately performs data entry of overdraft and reconciliation responses
Does an excellent job maintaining the general ledger
Reconciles entries and transfers subsidiary account summaries as needed
Ensures timely processing of payroll
Accurately processes, tracks, and manages payments and commissions
Accesses, prints, and distributes custodian bank statements
Excels in a high-volume accounting environment
Demonstrates proficiency with spreadsheets and accounting software
Accurately prepares reconciliations, internal wire movements, and client reports
Masters diverse bookkeeping functions
Effectively manages all facets of inventory, sales tax, and bank reconciliation

Needs Improvement

Has not demonstrated sufficient expertise with financial software
Tends to neglect the mail sorting and distribution part of her job
Has difficulty balancing A/P, A/R, payroll, and cash management duties
Often falls behind in general ledger analysis and financial statement preparation
Does not demonstrate a solid understanding of bookkeeping principles
Fails to display acceptable customer service when interacting with creditors
Controller

Meets/Exceeds Expectations

Maximizes return on financial assets
Approves budgets and initiates corrective action as required
Directs the preparation of financial data
Effectively evaluates internal controls
Ensures compliance with company guidelines
Regularly compares actual results to forecasts
Readily accounts for variances
Regularly prepares financial schedules for inclusion in supplemental reports
Supplies accurate information for use in income projections
Ensures that computer systems are in sync with the general ledger
Effectively tracks amortization costs versus expected lifetime revenues
Coordinates communication between financial reporting and operational finance
Reviews the assumptions and computations used for the scenario reserve

Needs Improvement

Fails to check calculations for overall reasonableness
Fails to interpret financial data accurately
Does not initiate corrective actions on a timely basis
Does not consistently achieve budget objectives
Is slow to advise management on needed actions
Has fallen behind in his understanding of new legislation
Puts forward overly optimistic income projections
Has not yet established appropriate disclosure controls and procedures
Has failed to share significant data with corporate auditors
Credit and Collections Manager

Meets/Exceeds Expectations

Duly protects our organization’s assets
Attentively reviews and supervises collection activities
Verifies the financial status of credit applicants
Actively approves credit
Skillfully negotiates payment plans with delinquent accounts
Collects all accounts receivable open items to improve cash flow
Regularly processes waivers and lien releases
Recommends approval or rejection of credit
Readily reviews credit applications for prospective customers
Establishes credit limits in accordance with company policies
Accurately maintains credit history, bankruptcy, and bad debt write-off files
Promptly researches credit histories of existing and potential customers
Effectively persuades customers to pay amounts due on credit accounts
Duly notifies customers of delinquent accounts
Solicits payment or negotiates extensions of credit, as necessary

Needs Improvement

Is slow to post payments to customers’ accounts
Does not accurately communicate credit limits and credit problems
Fails to document improved cash flow metrics and billing refinements
Does not process the placement of credit holds or requirements for prepayments
Fails to block order placements from customers with credit problems
Financial Analyst

Meets/Exceeds Expectations

Effectively forecasts business trends
Coordinates all aspects of budgeting, financial valuations, and reporting
Collects and monitors competitive performance data against forecasts
Assists in business planning and acquisitions modeling
Identifies opportunities for product expansion
Skillfully prepares division’s fiscal year budget
Effectively analyzes past operating budgets and variances
Projects future expenditures accurately
Aggressively monitors and adjusts departmental expenditures
Develops future cost-control guidelines
Develops computer applications to maximize user convenience
Addresses accounting irregularities and potential conflicts of interest
Assesses the potential financial impact of contractual obligations

Needs Improvement

Has difficulty presenting detailed financial information in layman’s terms
Fails to summarize economic information and trends
Misses opportunities to monitor overhead expenses through effective cost analysis
Fails to identify and account for budget variances
Shies away from internal-audit and sales-planning areas of responsibility
Human Resources

Benefits Administrator

Meets/Exceeds Expectations

Successfully administers all aspects of our company’s benefits program
Deals well with a sometimes aggressive and overly demanding workforce
Proactively studies industry trends and developments in benefits
Secures the greatest return on investment for our benefit dollars
Ensures that employees fully understand their benefits options
Promotes the benefits of participating in the company’s 401(k) program
Publicizes and draws attention to some of the lesser-known benefits programs
Ensures that we get maximum value for the benefits that we offer
Calculates future costs based on cost of living and benefits acceleration rates
Closely monitors changing legal requirements and new legislation
Networks regularly with benefits consulting services
Stays abreast of trends and best practices in benefits design
Seeks qualified outside counsel when needed to advise management
Maintains accurate benefit records and usage rates
Fully complies with HIPAA requirements
Ensures that benefit programs comply with statutory requirements
Reconciles benefit statement variances
Summarizes complex data and makes sound recommendations

Needs Improvement

Does not consistently interpret benefit policies accurately
Often fails to recognize the precedent-setting nature of her decisions
Tends to delegate more complex calculations to his subordinates
Falls behind in reviewing and approving billing statements
May allow a benefit proposal to languish rather than pushing it through
Does not aggressively explore new benefit options and alternatives
Has failed to ensure that our insurance carrier raise its level of customer service
Does not respond promptly to employee questions and concerns
Compensation Analyst

Meets/Exceeds Expectations

Maintains the integrity of the corporate pay structure
Ensures that all internal compensation decisions are justifiable and fair
Accurately calculates pay grades and ranges
Regularly participates in third-party compensation surveys
Thoroughly documents external market as well as internal equity salary data
Verifies that operating and capital budgets can support recommended courses of action
Excels in the areas of base pay data analysis
Regularly surveys comparative compensation practices at competitor companies
Explains to supervisors the necessary considerations in awarding promotions
Successfully enforces merit raise and incentive guidelines
Regularly ensures that job descriptions are up to date
Confirms that job requirements for open positions are valid
Compares proposed pay increases with budget and flags potential variances
Ensures that all compensation-related decisions receive appropriate corporate approval

Needs Improvement

Cannot always account for variances in compensation rates
Has difficulty recommending proposals for equity adjustments
Fails to demonstrate full comprehension of our sales incentive plan
Resists considering potential exceptions to the pay grade structure
Has inappropriately shared compensation data with other supervisors
Does not keep up to date on trends in compensation management
Relies on surveys rather than on data from active market comparisons
Employee and Labor Relations Representative

Meets/Exceeds Expectations

Strategically partners with department managers to reduce staff turnover
“Manages out” substandard performers via progressive disciplinary actions
Performs pre- and post-layoff analyses during periods of reductions in force
Works well with outside counsel to vet layoff proposals
Investigates and evaluates employee complaints in an objective fashion
Successfully conducts training workshops for first-time supervisors
Makes written records of employee and supervisor statements and actions
Provides advice and guidance that is consistent with policies and past practices
Successfully brokers disputes between supervisors and staff members
Creates a safe and neutral zone for employees with complaints or concerns
Maintains an environment of trust and open communication
Treats employees who have problems with dignity and respect
Skillfully manages workers’ expectations
Generates few if any union grievances or unfair labor practice charges
Effectively managed the preparation of the new employee handbook
Reduced the number of active grievances by 40 percent in eighteen months
Successfully encourages greater cooperation between union and management

Needs Improvement

Continues to have difficulty administering leaves of absence
Confuses workers’ compensation, FMLA, and ADA guidelines
Has breached confidentiality, exacerbating the problem and lessening trust
Does not return phone calls to internal clients in a timely manner
Lacks the necessary knowledge of federal and state employment laws
Fails to provide appropriate advice and counsel
Has not gained the trust and confidence of internal clients
Acts as an extension of management rather than an employee advocate
Fails to keep records of the resolution of conflicts and complaints
Recruiter (Corporate)

Meets/Exceeds Expectations

Spearheads strategic workforce planning efforts
Attracts a broad range of qualified applicants
Scouts exceptional talent
Effectively monitors staffing projections, turnover trends, and talent gaps
Identifies succession planning needs
Ensures that published job requirements are up to date and accurate
Regularly posts company job openings
Attends diversity job fairs and conducts college campus recruitment
Coordinates exploratory interviews for exceptional candidates
Effectively screens and interviews selected candidates
Administers tests to determine technical suitability
Strives to match a candidate’s personality to a department’s culture
Reduces costs by assessing and adjusting her recruitment outreach efforts
Measures staffing effectiveness using cost-per-hire and turnover metrics
Finds creative ways to encourage prior employers to provide references
Immediately notifies management of problems with background checks
Successfully negotiates salary offers
Accurately retains applicant flow results and EEO statistics
Follows up regularly with new recruits throughout the introductory period
Complies with all federal, state, and local employment laws
Provides training on the do’s and don’ts of interviewing and selection
Successfully matches internal talent with current job openings

Needs Improvement

Fails to pre-qualify candidates’ salary expectations
Often loses candidates to counteroffers after the completion of a search
Refers unqualified applicants to hiring managers
Fails to gather sufficient initial hiring data from hiring managers
Fails to provide agencies with adequate information to successfully screen applicants
Falls short of diversity outreach targets for female and minority recruitment
Regularly falls behind in paying advertising and temp agency bills
Fails to elicit sufficient information in candidate interviews
Is not sufficiently aware of employment laws
Often fails to “sell” the company to desirable job candidates
Training and Organizational Development Specialist

Meets/Exceeds Expectations

Excels at identifying training and development needs
Partners with department managers to understand their unique challenges
Successfully performs needs analysis, program design, and implementation
Analyzes weekly production ratios and quarterly per desk averages
Successfully forecasts strategic workforce planning needs
Has built a training program from scratch based on survey feedback
Maintains a network of industry trainers and executive coaches
Stays abreast of the latest training programs and tools
Exhibits outstanding platform skills
Delivers training materials in an effective and enjoyable format
Ensures that newly learned skills are consistently applied
Delivers state-of-the-art training methodologies and techniques
Successfully leads our department’s “train the trainer” efforts
Demonstrates a “best practices” approach in each learning module
Suggests new alignments for existing departments and work groups
Creates awareness of the importance of succession planning
Encouraged our CEO to adopt an “open book” approach to management
Routinely evaluates the impact of training on business results

Needs Improvement

Fails to identify opportunities for work restructuring or job redesign
Fails to identify opportunities for team building and management training
Has not been able to improve excessive turnover and absenteeism rates
Does not consistently evaluate training effectiveness
Fails to follow up with trainees to ensure practical concept application
Does not maintain training equipment and physical facilities
Has not received acceptable evaluation scores
Fails to adopt new training methodologies
Resists using survey feedback data when developing new training material
Information Technology

Data Entry Operator

Meets/Exceeds Expectations

Excels at alphanumeric data entry
Prepares source data for computer entry in a timely and accurate manner
Enters customer and account data with a minimum of errors
Obtains accurate data from sales orders, invoices, and licenses
Conducts mass updates of current database records with minimal errors
Accurately generates mass mailing lists
Skillfully creates and populates database fields
Regularly prepares and sorts source documents
Readily contacts preparers of source documents to resolve discrepancies
Diligently keeps track of source documents
Regularly reviews error reports and enters corrections into the computer
Carefully compiles, sorts, and verifies accuracy of data to be entered

Needs Improvement

Rarely purges files to eliminate duplication of data
Does not consistently file or route source documents after entry
Often fails to compare data entered with source documents
Tends to miss detecting errors due to carelessness
Reenters an excessive amount of data due to initial entry inaccuracies
Needs to be reminded to secure information by completing database backups
Database Administrator

**Meets/Exceeds Expectations**

Regularly monitors multiple database servers and troubleshoots errors
Skillfully performs quality reviews of database changes
Coordinates backup and recovery as well as disaster planning initiatives
Regularly implements physical database changes
Configures and installs software and administration tools
Oversees database schema impacts, application impacts, and data storage
Provides configuration support for new applications and database structures
Regularly monitors distributed databases for performance
Effectively manages all aspects of our site, including design and applications
Successfully serves as performance analyst and database architect
Understands database applications and operating system interactions
Troubleshoots problems in clustered application service environments

**Needs Improvement**

Appears to be less skilled at query optimization and schema design
Does not proactively monitor database performance and maintenance
Has difficulty functioning in a high-volume production service environment
Lacks proficiency in shell scripting and programming
Requires ongoing support as a capacity planner and as a monitoring tools developer
Has difficulty handling out-of-band requests
Avoids making herself available for periodic on-call duty
Help Desk Coordinator

Meets/Exceeds Expectations

Handles all inquiries on software, hardware, and network operations
Accurately responds to users and diagnoses problems
Methodically performs problem research, recognition, and resolution steps
Accurately opens tickets, triages, and escalates work requests
Consistently follows procedural guidelines
Logically determines initial assignment status
Readily assigns open service ticket requests
Accurately logs calls, diagnoses problems, and provides timely feedback
Clearly communicates technical information to nontechnical clients
Participates in new product beta and delta testing and documentation
Handily resolves complex problems

Needs Improvement

Often fails to assign more complex problems to second-level support
Has difficulty recognizing requests that fall outside his area of responsibility
Fails to follow up with clients about the status of open service ticket requests
Has yet to demonstrate a thorough understanding of help-desk operations
Lacks knowledge of requisite help-desk tools, processes, and methodologies
Does not exhibit creativity and flexibility in problem solving
Programmer Analyst

Meets/Exceeds Expectations

Successfully designs and tests technical solutions to business problems
Skillfully integrates processes and systems into existing applications
Demonstrates advanced analytical and problem-solving skills
Resolves issues only after assessing possible systems impact
Provides technical guidance and support to junior developers
Ensures that all standards are met for a variety of complex applications
Ensures high quality programs
Designs, codes, tests, debugs, documents, and maintains programs
Prepares detailed software specifications
Troubleshoots incidents reported by end users
Effectively communicates project status with clients and peers
Provides full life-cycle support to new processes and systems

Needs Improvement

Fails to grasp highly complex systems
Has difficulty processing technical solutions to meet business requirements
Lacks solid relational database skills
Will not adjust his schedule to accommodate off-hour systems
Has difficulty modifying moderately complex information systems
Has not achieved unit testing of developed code by the stated deadline
Has not consistently documented and tracked the status of open assignments
Project Manager

Meets/Exceeds Expectations

Successfully plans and coordinates teams for multiple IT projects
Efficiently manages time lines and budgets
Analyzes, designs, and implements cost-effective solutions
Thoroughly conducts systems analysis
Facilitates resolution of internal control problems
Serves as a liaison between vendors and internal personnel
Excels at creating and managing project plans
Strategically deploys and manages enterprise-wide management platforms
Provides direction for development, migration, and integration activities
Facilitates communication between program office and service territories
Regularly develops and fosters business partnerships with internal customers
Establishes accurate and well-communicated implementation procedures
Sees projects through from inception to deployment
Serves as the primary IT driver for delivering enhancements and new functionality

Needs Improvement

Fails to keep management abreast of schedule and budget challenges
Has not met expectations in technical presentations and proposal writing
Does not consistently define clients’ requirements
Fails to keep the internal Software/QA team engaged in clients’ goals
Does not stay abreast of new trends in technology
Systems Analyst

Meets/Exceeds Expectations

Successfully analyzes and defines application programs
Skillfully designs data processing procedures
Effectively writes and reviews programming specifications
Accurately codes new and existing computer programs
Determines system specifications
Recommends equipment changes
Prepares system flow charts
Successfully analyzes complex problems and defines application programs
Masters all phases of the project development life cycle
Readily supports the development, testing, and implementation of new systems
Recommends enhancements to existing systems
Meets implementation dates and deliverables as planned and under budget
Regularly meets with users to gather requirements for project definitions
Carefully analyzes existing procedures before making appropriate recommendations
Consistently abides by change control requirements for application development

Needs Improvement

Lacks sufficient knowledge of project management protocols
Fails to define new databases or modify existing applications, as required
Is ineffective as liaison between database users and developers
Has difficulty refining data and converting it into a programmable form
Is reluctant to provide general IT support on an ongoing basis
Legal

Attorney

Meets/Exceeds Expectations

Provides prompt and reliable legal advice and counsel
Skillfully drafts and reviews legal agreements to secure corporate interests
Regularly analyzes legal claims made against the company
Works effectively with outside counsel
Anticipates legal risks of pending business deals
Masters even the most complex litigation
Successfully resolves pending issues and ties up loose ends
Serves as a rich source of institutional knowledge in terms of past practices
Develops a high volume of new clients through a network of business contacts
Reviews, interprets, and analyzes agreements with a keen eye for detail
Skillfully negotiates and drafts contract modifications
Responds to subpoenas in a consistent and timely fashion
Is effective in the courtroom and articulate in instructing a jury about the law

Needs Improvement

Does not respond to legal queries in a timely manner
Fails to secure the company’s interests
Fails to ensure budget compliance with contractual requirements
Does not alert management to potential legal risks and litigation
Cannot yet orchestrate outside counsel in large-scale projects
Resists working the expected number of hours for a first-year attorney
Appears condescending when dealing with nonlawyers in other departments
Fails to consider past agreements when recommending courses of action
Contract Analyst

Meets/Exceeds Expectations

Skillfully administers and maintains the contract management system
Flags urgent contractual items for immediate review
Consistently tracks and logs all pertinent case information
Inputs newly acquired data into the departmental tracking system
Accurately drafts modification memos
Consistently refers any problems encountered to senior management
Carefully evaluates revision agreements
Incorporates proposed amendments into contract revisions
Interprets redline agreements accurately and precisely
Consistently tracks and saves all previous versions of documents
Regularly drafts pro forma documents for my signature
Skillfully analyzes incoming agreements for inconsistencies

Needs Improvement

Does not thoroughly analyze contracts to identify potential problems
Regularly falls behind in updating contract files
Misplaces incoming change orders, interim agreements, and amendments
Continues to struggle with legal terminology
Fails to identify discrepancies that fall outside of contract guidelines
Interprets revision agreements haphazardly
Legal Secretary

Meets/Exceeds Expectations

Provides legal secretarial support consistently and responsibly
Handles all matters relating to the preparation of correspondence
Revises contracts accurately
Tracks document modifications, including footnotes and cross-references
Demonstrates exceptionally strong word processing skills
Effectively prioritizes my schedule
Actively screens outside phone calls
Clearly sets clients’ expectations in terms of my ability to respond to their needs
Demonstrates outstanding organizational skills
Creates high quality visuals for bound and indexed client presentations
Accurately processes expense reports and travel authorizations
Willingly assists with billable hour computations
Effectively manipulates pro forma templates
Demonstrates a keen interest in business and legal affairs

Needs Improvement

Has difficulty taking shorthand or using the Dictaphone
Becomes confused when interpreting redline documents
Has difficulty reading his own writing and tracking his own changes
Can be too abrupt with clients and outside callers
Tends to pick and choose the attorneys for whom she wants to work
Paralegal

Meets/Exceeds Expectations

Excels at providing litigation support
Exercises sound judgment in preparing agendas for weekly legal meetings
Drafts interrogatories, schedules depositions, and prepares document indices
Regularly evaluates and responds to requests from outside parties
Successfully manages a high volume of cases
Serves as a helpful communication link with outside counsel
Has a thorough understanding of the steps involved in civil litigation
Successfully assists with litigation, administrative, and compliance matters
Regularly prepares affidavits of documents and maintains document files
Processes bills and vouchers from outside counsel and related vendors
Assists with discovery, including the review and production of documents
Monitors court dockets
Prepares and files proofs of claim, pleadings, and fee applications
Prepares and maintains corporate records

Needs Improvement

Lacks focus when reading and interpreting contracts
Fails to provide the departmental legal assistant with clear instructions
Fails to monitor licensees to ensure that they fulfill their contractual obligations
Has not taken the time to bring her contract files up to date
Fails to extract applicable information when reading and interpreting contracts
Does not demonstrate sufficient flexibility to handle clerical duties
Manufacturing

Assembly and Packaging Technician

Meets/Exceeds Expectations

Accurately receives, scans, and inspects product
Assembles approximately 500 parts per hour with minimum error
Re-scans and repackages products according to company guidelines
Satisfactorily performs limited mechanical assembly
Handles small parts very carefully and accounts for all components
Demonstrates appropriate knowledge and skill with power and hand tools
Reads blueprints and schematics
Readily troubleshoots, repairs, and rebuilds units
Rotates job duties in the areas of assembly, inspection, and auditing
Recommends and implements changes to the assembly processes
Works with manufacturing engineers to convert metric to US standards
Identifies requirements for special tools, fixtures, and gauges
Provides shop floor supervision as the shop grows
Fixes machines when they break down
Loads and unloads trucks when asked

Needs Improvement

Is reluctant to assist in the areas of machine operation and packaging
Fails to consistently inspect products before they leave the warehouse
Is unable to solve a variety of machining and assembly problems
Lacks sufficient knowledge of assembly processes and equipment
Appears dissatisfied with the repetitive nature of his work
Distribution Manager

Meets/Exceeds Expectations

Plans and directs all warehouse operations
Ensures that job responsibilities are promptly and efficiently carried out
Oversees the proper inventory control of all warehoused products
Ensures that warehouse operations comply with federal, state, and local law
Maintains accurate physical inventories of all company products
Consistently meets diverse shipment demands
Ensures that all pending orders are scheduled within 24 hours
Delivers orders within seven days of receipt
Oversees product master scheduling and global distribution of products
Makes management aware of material and labor shortages
Provides input for revenue estimates and demand projections
Successfully achieves 24/7 coverage to assure timely shipments to customers
Responsibly oversees warehousing inventory control and fulfillment
Ensures that housekeeping meets company and FDA standards

Needs Improvement

Fails to retain accurate paperwork for inventory receipt and pick-ups
Has difficulty calculating discounts, interest, commissions, and percentages
Is disadvantaged by a lack of supply chain management and APICS certification
Fails to consistently meet goals for on-time shipment
Does not promptly report rescheduling needs caused by backlogs
Equipment Technician

Meets/Exceeds Expectations

Prioritizes and completes needed repairs
Makes repairs in accordance with operating manuals
Identifies local parts distributors and service vendors
Purchases supplies within approved dollar authority
Maintains sufficient inventory of readily used supplies
Regularly advises management of needed equipment purchase and repair
Performs warranty work in accordance with manufacturers’ specifications
Attends training and safety programs offered by equipment manufacturers
Educates personnel on proper maintenance and use of equipment
Ensures that completed work meets blueprint and schematic specifications
Provides technical support on factory-assembly production equipment
Routinely implements preventive maintenance procedures
Identifies and resolves equipment failures
Supports field engineering with equipment and process enhancements

Needs Improvement

Fails to adequately anticipate and diagnose equipment problems
Does not consistently obtain and retain warranty certifications
Lacks the appropriate safety orientation for hand and power tools
Repeatedly fails to sanitize rental equipment upon return
Often avoids assisting in loading and receiving inventory
Machinist

Meets/Exceeds Expectations

Initiates procedures for machine setup and operation sequences
Accurately selects, measures, assembles, and sets up cutting tools
Efficiently mounts, aligns, and secures fixtures and materials
Loads programs into machine control in order to start automatic operation
Regulates cutting depth, speeds, and coolant flow during machining operations
Confers with programmer to resolve machining or programming problems
Has detailed knowledge of precision measuring instruments
Inspects critical dimensions on work pieces as prescribed by setup data
Provides support in the areas of assembly, sourcing, and errands
Skillfully operates numerically controlled machine tools
Performs progressive machine operations to exacting tolerances
Works well from drawings and specifications
Regularly records and documents required information in production sheets

Needs Improvement

Is reluctant to participate in on-the-job training provided by team leaders
Fails to maintain a clean work area
Does not regularly observe all safety rules and company regulations
Lacks the necessary technical training in the machine tool trades
Does not demonstrate sufficient skills in shop math and blueprint reading
Manufacturing Supervisor

Meets/Exceeds Expectations

Regularly ensures that production goals are met
Maintains safety, quality, and productivity goals
Prioritizes production schedules
Oversees product introduction, equipment efficiency, and materials supply
Keeps engineering informed of product difficulties or quality problems
Ensures that master batch formulas are executed and documented correctly
Promotes safety awareness
Reviews processes with the intent of improving quality, economy, and efficiency
Regularly ensures that quality assurance standards are maintained
Analyzes continuous process improvement controls
Routinely performs quality checks
Communicates problems during shift change meetings
Plans and schedules manpower to meet production demands
Ensures that expenses do not exceed budgeted amounts

Needs Improvement

Fails to confirm that master batch formulas are accurate
Neglects performing investigations and root cause analysis
Does not regularly ensure that subordinates are trained on jobs assigned
Does not maintain a clean working environment
Fails to enforce strict adherence to all safety practices
Does not demonstrate adequate control over departmental costs
**Master Scheduler**

**Meets/Exceeds Expectations**

- Regularly maintains planning and master production schedules
- Ensures that specified production and inventory levels are achieved
- Successfully schedules facility workload to help meet service goals
- Helps gain management approval for new master scheduling policies
- Conducts regular master schedule meetings
- Accurately produces processing plans
- Calculates facility capacity, materials availability, and due dates
- Proactively investigates future department level scheduling
- Synchronizes master schedule, floor schedule, and shipping schedule
- Coordinates materials, tooling, and equipment resources for upcoming jobs
- Compiles and summarizes production and downtime data
- Highlights problems with production reporting and suggests solutions
- Expedites material shortages to meet customer delivery requirements
- Coordinates production planning in light of backlog and forecast requirements

**Needs Improvement**

- Fails to initiate corrective scheduling actions
- Does not readily volunteer input into the strategic production plan
- Lacks sufficient understanding of plant flexibility requirements
- Fails to routinely confirm delivery dates for new or changed orders
- Does not maintain the shop schedule at order level
Production Control Assistant

Meets/Exceeds Expectations

Regularly prints and batches production orders
Ensures that part numbers meet spec requirements
Enters part numbers into the system in a timely fashion
Collects and sorts production records
Compiles appropriate production control reports
Accurately calculates and reports daily production numbers
Assists in creating and maintaining procedures to ease daily operation
Diligently maintains data integrity of item master
Acts as a liaison between inventory control and internal customer groups
Coordinates and communicates order cancellations
Facilitates order queries and releases
Efficiently dispatches approved rush requests
Accurately calculates scrap, waste, and defect data
Regularly researches historical data

Needs Improvement

Fails to organize receipts of vendor invoices
Does not consistently process freight damage/loss reports
Fails to assist with backorder notifications and log entries
Does not regularly secure information by completing database back-ups
Is often delinquent in managing daily exception reports
Production Lead

Meets/Exceeds Expectations

Regularly oversees shift activities
Ensures the safe operation of production lines and machinery
Meets production goals, quality, and cost objectives
Regularly ensures that line personnel are thoroughly trained
Manages the daily assignment of nonexempt manufacturing personnel
Organizes line workload and staffing depending on product priority
Ensures that quality standards in materials and fabrication methods are maintained
Handles all aspects of start-up, operation, and preventive maintenance
Assists in the development and refinement of manufacturing processes
Diligently tracks production efforts
Maintains compliance with established ISO procedures
Ensures that assignments are performed within established safety guidelines
Minimizes excess material on the floor
Coordinates and monitors the availability of operation supplies and equipment

Needs Improvement

Fails to verify that only authorized documentation is available on the line
Does not regularly inform employees of deviations or changes
Does not notify management regarding employee concerns or recommendations
Fails to ensure that personnel are properly trained
Has difficulty keeping assigned areas clean and organized
Fails to handle minor repairs
Production Supervisor

Meets/Exceeds Expectations

Achieves plant goals for safety, quality, and productivity
Utilizes key operating indicators for control of product cost
Manages material usage, machine downtime, and expenditure control
Successfully oversees production scheduling
Improves materials tracking
Regularly establishes work schedules
Manages all production activities to ensure excellent results
Ensures that quality assurance specifications are met
Supervises hourly affiliated employees according to union contract guidelines
Aggressively investigates labor, cost, and process variances
Oversees packaging, shipping, facility maintenance, and environmental monitoring
Trains operators to maintain safety protocols
Effectively communicates the proper procedures and steps in building product

Needs Improvement

Fails to produce quality product
Lacks a functional knowledge of lean manufacturing concepts
Neglects to keep the night shift informed of production progressions
Fails to build products to company specifications
Gets overwhelmed by the overlapping demands of production and scheduling
R&D Engineer

Meets/Exceeds Expectations

Develops new concepts from initial design to market release
Regularly conducts feasibility studies
Skillfully writes and submits intellectual property patents
Maintains detailed documentation throughout all phases of research and development (R&D)
Investigates and evaluates existing technologies
Thoroughly researches, develops, and designs materials and components
Reviews and coordinates vendor activities to support development
Strives to improve the quality and performance of existing products
Readily assists in the development of new products
Develops conceptual and detailed designs
Regularly conducts test programs to evaluate product performance
Develops accurate and cost-effective diagrams and layout drawings
Ensures that engineering specifications conform to customer requirements
Envisions and develops tests to acquire functional data on new designs
Drafts prototype machined parts and tooling

Needs Improvement

Has difficulty converting raw data into refined data
Fails to demonstrate sufficient knowledge of tooling and instrumentation
Lacks an understanding of data acquisition methods
Has difficulty integrating concepts into final products
Fails to execute project deliverables on a timely basis
Supply Chain Manager

Meets/Exceeds Expectations

Effectively plans and directs all aspects of supply chain initiatives
Retains complete responsibility over the supply chain process
Skillfully evaluates advanced planning and scheduling procedures
Oversees storage capabilities, scheduling, warehousing, and shipping
Plans and schedules manufacturing capacity
Ensures that company purchases are maximized
Effectively manages supplier relationships
Is proficient in using e-commerce/information technology
Drives continuous improvement initiatives within the local supply chain group
Establishes goals that are in line with lean and demand flow methodologies
Successfully coordinates activities with plant manufacturing
Consistently ensures on-time completion of allocated master production plans

Needs Improvement

Lacks experience in a consumer-oriented make-to-stock environment
Fails to thoroughly involve himself in all facets of the commodity life cycle
Does not formulate adequate plant production plans
Has not fully participated in driving supply chain automation
Fails to regularly practice safety-conscious behaviors
**Technical Writer**

**Meets/Exceeds Expectations**

Accurately researches, outlines, and writes technical documents  
Regularly develops, produces, and maintains reference manuals  
Develops style guides and service guides  
Provides thorough technical instruction with users’ manuals  
Skillfully develops drawings, sketches, diagrams, and charts  
Oversees product installation, maintenance, and repair  
Uses consistent writing style and accurate grammar, spelling, and punctuation  
Drafts documents that conform to established master templates  
Ensures that all documentation is accurate and complete  
Performs thorough research when initiating an assigned project  
Determines needed scope, content, purpose, and audience  
Uses functional specifications and source materials to design key concepts  
Regularly works with the printer to review and approve document proofs

**Needs Improvement**

Lacks familiarity with industry-standard desktop publishing tools  
Fails to use appropriate resource materials during the writing process  
Is unable to develop end-user documents from start to finish  
Does not complete final documentation on schedule  
Fails to maintain version control of documents
Operations

Administrative Assistant

Meets/Exceeds Expectations

Does a very thorough job administering office services
Effectively maintains the work flow in our department
Quickly resolves administrative problems
Provides consistent customer service support
Ensures that all clients are treated with the utmost respect and professionalism
Thoroughly plans, organizes, and schedules our department’s workload
Flags hot issues that require management’s immediate attention
Proofreads and edits documents and makes necessary corrections
Always makes visitors feel comfortable
Maintains an up-to-date and organized filing system
Excels at coordinating a high volume of meetings
Keeps me informed of updates and last-minute changes in schedule
Highlights pertinent articles in trade journals and on the Internet
Consistently monitors office inventories and anticipates needed supplies

Needs Improvement

Falls behind in processing expense reports
Fails to screen calls effectively
Misspells callers’ names and transposes telephone numbers
Has a very difficult time prioritizing the workload
Maintains a disorganized desk
Has difficulty locating necessary documents on short notice
Causes unnecessary delays by having to do things twice
Requires a concrete outline of specific instructions
Fails to keep me informed of schedule changes
Mislabels files and misses typos in correspondence and reports
Pays too little attention to details
Has not tried to advance her technical knowledge and skills
Customer Service Representative

**Meets/Exceeds Expectations**

Excels at serving customers  
Provides product and service information in a timely fashion  
Readily resolves product and service discrepancies  
Enhances customers’ sales and purchasing satisfaction  
Consistently recommends ways to improve customer service  
Creates a welcome and open dialogue with prospects  
Questions prospects appropriately  
Presents products on a problem-to-solution basis  
Continuously evaluates customer feedback and recommendations  
Delivers efficient service and high quality  
Possesses a detailed knowledge of formal agreements with vendors  
Effectively translates customer requirements to match our system  
Resolves inquiries regarding order status and general product information  
Regularly resolves billing errors via debit and credit memos  
Qualifies new customers in terms of systems ordering capability  
Rapidly investigates errant shipments and shortage inquiries  
Diagnoses the causes of problems and selects the best solutions

**Needs Improvement**

Frequently fails to resolve customers’ problems in a timely manner  
Does not proactively act on customers’ suggestions  
Fails to bring problematic customer issues to management’s attention  
Appears to cover up service issues rather than share them  
Does not submit product and service reports by established deadlines  
Demonstrates an insufficient knowledge of the online data entry system  
Commits excessive errors when documenting product numbers and
change orders
Sometimes fails to gain permission for approved or amended orders
Lacks sufficient knowledge of updated products
Continues to misdiagnosis basic customer inquiries
Does not currently meet outbound call volume benchmarks
Fails to qualify prospective customers
Fails to ask questions that are critical to the sale
Does not listen attentively to customers’ needs
Executive Secretary

Meets/Exceeds Expectations

Excels at providing one-on-one executive support
Ensures that all aspects of office administration are well taken care of
Independently composes correspondence without error
Accurately takes dictation using shorthand/fast notes/Dictaphone
Requires little direction in completing administrative assignments
Interfaces well with all levels of the senior management team
Makes visitors feel comfortable and welcome in our office
Is excellent resource on questions about office procedures and protocol
Screens calls aggressively
Is very protective of my time
Is very attentive to detail when proofreading and editing drafts
Ghostwrites memos for company-wide distribution
Demonstrates good use of language and vocabulary
Possesses advanced software skills
Prepares sophisticated PowerPoint presentations for sales meetings
Regularly attends meetings in my absence
Finds creative ways to streamline the workflow
Provides back-up administrative support to other members of management
Always says yes to a request for help
Is able to produce obscure or long-forgotten documentation quickly

Needs Improvement

Has difficulty working for more than one boss
Remains reluctant to say no when appropriate
Fails to share what his other priorities are
Does not regularly proofread or edit final drafts
Commits too many grammar and spelling errors
Fails to maintain an organized and up-to-date filing system
Requires temporary back-up support too often
Has difficulty managing my calendar and coordinating my travel schedule
Demonstrates resistance when asked to answer others’ phones
Requires repeated instruction and close supervision
Facilities Maintenance Supervisor

Meets/Exceeds Expectations

Supervises utility workers and contractors in general plant upkeep
Regularly oversees the planning and design of buildings and other facilities
Estimates costs for construction and facilities projects
Coordinates the maintenance and remodeling of machinery
Develops successful design criteria
Serves as key point of contact with architectural and engineering firms
Prepares accurate bid sheets
Thoroughly inspects construction and installation progress
Ensures conformance with established specifications and schedules
Is knowledgeable of building code and regulatory compliance issues
Effectively oversees clean-up, landscaping, and related work
Provides guidance to mechanics, electricians, and contractors
Troubleshoots repair issues for machines and equipment
Maintains the computerized maintenance management system
Acts as main contact for vendors on construction and deliveries

Needs Improvement

Is technically lacking in the areas of electrical and plumbing
Regularly neglects responsibilities for setup and takedown of equipment
Fails to ensure that manpower and machines are available when needed
Does not obtain sufficient price quotes for needed repairs
Fails to communicate production challenges and delays
Office Manager

**Meets/Exceeds Expectations**

Ensures the proper flow of work throughout the office
Manages the dual role of supervising staff and maintaining office systems
Ensures a high level of office staff performance
Closely monitors her direct reports’ efforts
Forecasts the administrative and operational needs of the office
Accurately schedules office expenditures
Identifies and resolves budget variances
Constructs action templates that others could follow in his absence
Serves as jack of all trades
Accurately maintains petty cash and stocks of office supplies
Troubleshoots hardware and software problems
Regularly prepares weekly attendance reports
Processes payroll without error
Administers equipment purchase, rental, and repair

**Needs Improvement**

Has difficulty confronting subordinates’ problematic performance
Alienates other support staff members who do not report directly to her
Clearly prefers the technical over the people-oriented aspects of her job
Lacks an advanced level of computer proficiency
Must rely on others to handle even the most basic of computer-related tasks
Is rarely willing to work overtime
Resists any change from established office guidelines
Shows favoritism to certain members of his team
Avoids mail sorting and distribution responsibilities
Resists dealing with the sudden changes to schedule
Fails to follow office policy and protocol
Receptionist

Meets/Exceeds Expectations

Pleasantly greets, welcomes, and directs visitors
Duly notifies employees of visitors’ arrivals
Generates a professional image of the company
Serves as the first point of contact for all incoming phone calls
Makes introductions in a professional and warm manner
Serves as the first checkpoint of building security
Ensures that all visitors have appropriate identification badges
Voluntarily walks guests to their destinations rather than leaving them on their own
Routes all departmental mail accurately
Distributes all incoming courier packages to recipients in a timely manner
Follows all front office policies and procedures
Refers potential conflicts with visitors to the appropriate manager
Receives recognition from visitors regarding her friendliness and professionalism
Readily provides back-up support work without being asked

Needs Improvement

Has difficulty directing callers to the appropriate parties
Lacks familiarity with key players in the organization
Fails to ensure that visitors sign the logbook and wear badges
Leaves the desk too often to fraternize with others
Permits an excessive number of incoming calls to go to voicemail
Displays a lackluster and apathetic attitude
Acts as if certain manual duties are below him
Fails to follow front office dress code protocol
Has not yet mastered the technical aspects of the telephone system
Has particular difficulty coordinating conference calls
Gets flustered when the console lights up with too many incoming calls
Leaves callers on hold for excessive periods of time
Research Manager

**Meets/Exceeds Expectations**

Successfully plans, executes, and analyzes traditional marketing research
Effectively aids management decisions on new product/service development
Continually evaluates the effectiveness of research
Continuously investigates new research tools and methodologies
Helps clients improve their strategic vision and profit
Identifies new market trends and opportunities
Strategically assesses market and competitive conditions
Excels at managing qualitative and quantitative market research projects
Supports new product development
Regularly engages in data collection and research design
Prepares effective survey instruments and discussion guides
Is highly regarded for the quality of her research design and analysis
Demonstrates solid report writing skills
Proactively investigates new methods and technologies
Regularly recommends testing and validation
Delivers actionable marketing insights in a cost-effective manner
Excels at assessing primary market research needs

**Needs Improvement**

Has difficulty relating to consumer wants and needs
Lacks a thorough understanding of marketing and customer profiling
Remains challenged by proposal writing
Has difficulty outlining objectives, methodologies, and costs
Has yet to demonstrate full competency in research design and analysis
Fails to consistently validate analyses against industry standards
Has difficulty translating customer feedback into actionable recommendations
Lacks familiarity with Nielsen syndicated data and statistical software
Risk Manager

Meets/Exceeds Expectations

Effectively forecasts risks
Designs, negotiates, and purchases appropriate insurance coverage
Identifies all factors with the potential for causing financial losses
Participates in the management of major claims
Keeps management properly advised of pending risks
Develops policies that prevent or mitigate loss exposures
Develops insurance and risk management emergency response policies
Strategically analyzes corporate insurance requirements
Forecasts and budgets for insured and retained losses and premiums
Effectively sets claim reserves
Provides appropriate loss indemnification language for proposed contracts
Collects, develops, and analyzes insurance underwriting information
Manages compliance with state regulations and insurers’ requirements
Prepares the annual insurance budget

Needs Improvement

Does not accurately forecast premiums or allocate reserve variances
Fails to consistently follow up on audit and examination findings
Has not kept abreast of recent changes in laws and applicable regulator guidance
Has missed opportunities to review leases, contracts, and operational policies
Lacks knowledge of workers’ compensation and claims monitoring
Has not yet learned how to measure and monitor credit exposures
Safety and Security Supervisor

Meets/Exceeds Expectations

Successfully supervises a broad range of health and safety activities  
Demonstrates mastery of OSHA compliance and workers compensation  
Ensures compliance with all aspects of our safety and security program  
Leads business recovery, site security, and evacuation planning efforts  
Regularly conducts programs for the safety and security of employees  
Has developed a workable corporate disaster plan  
Carefully reviews injury and vehicle accident trends  
Readily recommends effective safety enhancements and corrective actions  
Maintains accurate records of inspections, periodic maintenance, and repairs  
Supervises inspections of fire suppression systems, extinguishers, and alarms  
Facilitates effective access control  
Ensures that ID badges, pass codes, and keys are in proper working order  
Regularly maintains security alarm authorized user lists and codes  
Serves as a single point of contact for all security system issues  
Conducts timely investigations of all work-related safety accidents  
Regularly accompanies all insurance inspectors on walk through tours

Needs Improvement

Fails to maintain accurate records of inspections and audits  
Does not keep abreast of improvements in safety equipment  
Fails to conduct industrial hygiene surveillance inspections  
Does not regularly communicate safety and security concerns to management  
Has fallen behind in providing employee safety orientation training
Transportation Supervisor

Meets/Exceeds Expectations

Schedules the timely delivery of freight
Manages both the fleet and driver workforce
Oversees the general supervision of transportation logistics
Maintains the truck routing system and daily dispatch sheet
Regularly identifies opportunities to increase back-haul revenue
Communicates effectively with vendors, trucking companies, and buyers
Regularly maintains dispatch schedules
Ensures that loads are shipped on time
Provides up-to-date information to drivers, clerks, and back-haul coordinators
Creates timely tracking reports
Effectively tracks goals, customer service, and cost control
Coordinates efficient route deliveries
Ensures timely pickup times for scheduled back hauls
Ensures compliance with company policies and federal DOT regulations
Prioritizes the flow of trucks and trailers

Needs Improvement

Resents having to occasionally deliver product himself
Fails to effectively coordinate dispatch functions and load efficiencies
Often fails to ensure the timely departures of loads
Does not sufficiently support hub operations
Does not readjust for inbound/outbound schedules, delays, or re-routes
Cannot yet demonstrate mastery of trucking software
Warehouse Manager

**Meets/Exceeds Expectations**

Manages all aspects of warehouse operations
Successfully oversees receiving, shipping, and cycle counting
Plans, organizes, and monitors all activities within the receiving warehouse
Ensures smooth and consistent warehouse operations
Responsibly accounts for the accuracy of the warehouse inventory
Ensures the timely flow of materials into and out of the warehouse
Oversees the safe and efficient movement of incoming materials
Regularly ensures that materials are stored properly to conserve space
Has strong knowledge of warehouse and material handling operations
Monitors uniform procedures for storing, inventoring, and shipping
Successfully moves materials to and from storage configurations
Generates up-to-date task lists, operating instructions, and error reports
Insists on an orderly, clean, and accident-free department

**Needs Improvement**

Fails to adequately manage the computerized inventory control program
Does not consistently examine work for exactness or conformance to policy
Neglects inspecting the physical condition of the warehouse and equipment
Fails to maintain inventory accuracy of 97 percent or better
Does not safely operate material handling equipment
Sales, Marketing, and Advertising

Account Executive

Meets/Exceeds Expectations

Excels at identifying and closing new sales prospects
Engages in a consultative selling style
Continuously meets or exceeds sales expectations
Generates a high number of leads through cold calling and personal referrals
Sets the appropriate number of sales activities to meet performance targets
Strategically conducts the appropriate needs analysis
Presents products on a problem-to-solution basis
Always puts the customer’s needs above the need to close the sale
Makes the greatest number of sales presentations month after month
Tracks the quality ratios of sales calls to maximize each territory’s potential
Develops and follows a well-researched client development plan
Remains in the top tenth percentile of account executives in terms of revenues
Closes a high volume of new business and account renewals
Sees each sale through to the client’s satisfaction
Maintains accurate records of cold calls, presentations, and sales results
Readily handles contract renewals and price adjustments
Proactively identifies current and future customer service requirements
Quickly establishes rapport with potential customers
Demonstrates effective negotiation and closing techniques
Secures profitable, high margin business
Maintains long-term client relationships
Has a very high retention and repeat-business rating
**Needs Improvement**

Is more transaction-oriented than relationship-driven
Does not proactively identify and evaluate unexploited assets or revenue sources
Has not consistently met monthly sales quotas
Spends too much time chasing low margin business
Has ongoing difficulties maintaining a stable portfolio of clients
Shies away from negotiating complex deals
Cannot effectively articulate competitors’ strengths and weaknesses
Is unable to articulate the company’s competitive advantage
Fails to pursue opportunities for account growth and new business development
Has developed a reputation for being territorial and inflexible
Fails to close major business deals within his assigned territory
Has difficulty developing industry relationships and networks
Art Director

Meets/Exceeds Expectations

Creatively conceptualizes and develops advertising campaigns
Supervises the preparation and acquisition of all advertising materials
Conceptualizes, develops, and executes key art
Generates appropriate artwork and ancillary promotional materials
Effectively designs all necessary advertising materials
Directs the execution of key art
Manages all aspects of illustration, retouching, and digital image creation
Provides art direction and design supervision of final presentations
Ensures timely and accurate cost estimates and financial accountability
Successfully creates presentation boards to present to clients
Develops art for trade print publications and point-of-purchase displays

Needs Improvement

Lacks detailed knowledge of the creative tools available
Designs concepts and layouts that are inconsistent with brand guidelines
Does not stay current with the latest graphic trends
Fails to meet advertising project deadlines and budgets
Lacks experience in both design and illustration
Lacks a functional knowledge of mechanical production
Cashier/Checker

**Meets/Exceeds Expectations**

- Accurately totals customers’ purchases
- Itemizes payments at point of sale
- Displays a thorough knowledge of store products and merchandise
- Ensures proper cash register balancing with no variances
- Regularly verifies consumers’ credit
- Encourages customers to purchase store credit cards
- Accurately enters price changes
- Ensures that price sheets and coupons are up to date
- Properly handles exchanges and returns merchandise
- Provides accurate pricing information
- Discounts purchases by redeeming coupons
- Readily alerts management to any potential security or theft violations

**Needs Improvement**

- Does not consistently demonstrate strong customer service skills
- Has difficulty balancing the cash drawer
- Fails to discount information that is not preprogrammed into the system
- Appears unwilling to perform noncashier duties, such as stocking and lifting
- Fails to proactively assist customers in locating merchandise
- Neglects keeping display tables well-stocked for convenient shopping
- Does not readily document out-of-stock merchandise
- Fails to consistently ensure that UPC codes on merchandise are correct
Event/Conference Coordinator

Meets/Exceeds Expectations

Successfully processes seminar and convention registrations
Accurately records payments for registrants, exhibitors, and sponsors
Prepares name badges and event registration rosters without error
Assists in managing the logistics of speaker presentations
Diligently books guest and meeting rooms
Ensures the timely distribution of promotional materials for seminars
Coordinates the collection, compilation, and packaging of speakers’ notes
Assists in the management of volunteer corps
Regularly maintains seminar, conference, and convention event schedules
Distributes participant continuing education forms
Obtains state licensing board CE credit approval for seminars
Willingly assists in all levels of pre-conference planning
Ensures that meeting rooms are properly equipped and prepared
Coordinates all aspects of on-site signage and audiovisual requirements

Needs Improvement

Fails to consistently coordinate catering and audiovisual requirements
Lacks a basic knowledge of event and meeting planning principles
Is slow to wrap up post-conference financial settlement of invoices
Is not familiar with the operational requirements for audiovisual equipment
At times appears resentful of early morning, evening, and weekend hours
Fundraising/Development Executive (Nonprofit)

Meets/Exceeds Expectations

Responsibly oversees the planning and execution of all fundraising
Manages the solicitation and stewardship of major gift prospects
Devises strategies for achieving fundraising goals
Develops contributed financial support, including membership and grants
Serves as liaison with news media for exhibitions and special programs
Demonstrates outstanding leadership working with boards of directors
Skillfully organizes and coordinates social and special events
Continuously solicits corporate underwriters and in-kind donations
Diligently oversees annual membership drives
Spearheads membership drives, including direct mail and telephone solicitations
Instills trust and loyalty in clients and contributors
Possesses solid experience in major gifts and planned giving

Needs Improvement

Does not possess comprehensive fundraising or grant-writing skills
Neglects the development of planned giving and endowment initiatives
Lacks knowledge of intestacy laws and estate planning strategies
Has difficulty structuring and conducting planned giving campaigns
Is not familiar with credit trusts and wealth replacement trusts
Has not consistently met fundraising and development target goals
Graphic Designer

Meets/Exceeds Expectations

Provides graphic design and graphics production support
Promptly completes layout revisions
Optimizes and retouches graphics
Creatively illustrates concepts
Successfully designs rough layout of art and copy
Has a good sense of appropriate graphic size, style, and arrangement
Makes edits and changes to files in a timely and efficient manner
Is flexible and willing to experiment with color, contrast, and backgrounds
Develops new and exciting patterns and designs
Successfully launches special design projects
Implements art direction and design concepts across a range of projects
Consistently verifies size, color, and other production-related issues
Reliably executes graphic output for single-color and multicolor ads
Processes form orders in accordance with eligibility guidelines

Needs Improvement

Lacks necessary Web and HTML coding skills
Is technically challenged in the areas of scanning and image production
Fails to maintain graphic design equipment in proper working order
Fails to regularly purge files of forms that are no longer in use
Does an unsatisfactory job maintaining archival creative job files
Market Research Analyst

Meets/Exceeds Expectations

Initiates marketing campaigns
Does a thorough job identifying marketing opportunities
Researches and analyzes market data
Provides strategic decision support for marketing management
Delivers relevant and accurate information, analysis, and insight
Successfully analyzes and synthesizes survey data
Prepares accurate reports of findings to marketing management
Evaluates promotional materials
Produces regular forecasts of market trends and competitive activity
Works closely with internal customers to define initial requirements
Tests products to make effective product recommendations
Composes questionnaires and interprets results
Develops trend data based on test panel results
Performs campaign response analysis and modeling
Provides insight into customer retention and cross-sell potential
Regularly provides data-driven analysis of current marketing activities
Identifies and extracts lists according to campaign specifications

Needs Improvement

Fails to make clear recommendations based on research findings
Lacks the ability to communicate technical results to nontechnical audiences
Makes ineffective recommendations regarding product positioning
Relies too heavily on outside agencies
Continues to exceed budget
Lacks proficiency in direct marketing analytical methods
Does not communicate effectively with sales and R&D staff
Marketing Director

Meets/Exceeds Expectations

Effectively conceptualizes, develops, and executes marketing campaigns
Successfully drives the creation and delivery of integrated marketing solutions
Meets strategic marketing objectives
Creates consistent campaigns across all marketing media
Uses direct mail, e-mail blasts, and billboards to ensure maximum penetration
Tailors marketing campaigns to promote products with the highest revenue potential
Creates and develops collateral and brochures
Ensures the accurate delivery of consolidated plans within allocated budgets
Oversees all aspects of response tracking and measurement
Excels at new account acquisition
Successfully retains relationships with assigned/existing accounts
Readily accepts the challenge of new sales activities
Works well with the sales team in prospecting, qualifying, and closing sales
Serves as an effective liaison between customers and our internal technical team
Regularly ensures successful project completion and customer satisfaction
Employs churn, satisfaction, and usage metrics for customer satisfaction programs
Maintains dialog with account directors to up-sell additional functionality

Needs Improvement

Fails to work closely with the installation team during implementation
Misses opportunities to develop long-term relationships with key contacts
Fails to review client accounts for up-sell or cross-sell opportunities
Is unable to answer basic questions about sales projections
Fails to create compelling and innovative marketing campaigns
Lacks skills in the areas of online sweepstakes and product placement
Media Planner

Meets/Exceeds Expectations

Effectively executes media campaigns
Oversees the creation of media plan flowcharts
Handles all buying, tracking, and reporting of media plans
Develops and implements media objectives and strategies
Takes charge of the creation and maintenance of media plans and budgets
Efficiently tracks advertising spending by market
Keeps up to date with the current media landscape
Maintains professional relationships with the media community
Regularly researches new opportunities with current and future clients
Develops media objectives and strategies across all types of media
Generates accurate tracking report evaluations
Attends client meetings, prepares budgets, and generates competitive analyses
Develops accurate specification sheets and requests for proposal
Coordinates invoicing, quality control, and reconciliation of media buys

Needs Improvement

Fails to analyze the value of media vehicles for client media plans
Lacks sufficient quantitative skills to create formulas and execute calculations
Neglects buying and trafficking responsibilities
Fails to reconcile media buys and administer requests for proposal
Lacks proficiency with syndicated research or media planning tools
Fails to maintain deliverable schedules with all necessary changes and additions
Product/Brand Manager

Meets/Exceeds Expectations

Develops key marketing and sales programs
Ensures the appropriate implementation of marketing plans
Has a keen understanding of marketing principles and practical applications
Prepares and updates marketing budgets
Accurately projects costs for all advertising and point-of-purchase materials
Skillfully calculates budgets against projected revenues
Develops point-of-purchase items, trade materials, and special promotions
Effectively allocates marketing materials through all channels of distribution
Analyzes the effectiveness of past promotions
Incorporates successful elements of past promotions into future marketing plans
Schedules releases and promotions that capitalize on market opportunities

Needs Improvement

Does not expedite the approval of sales materials
Fails to ensure that program releases are announced in a timely manner
Fails to develop cross-promotional opportunities with outside companies
Shows little effort to maximize product visibility and boost sales
Provides minimum input regarding development of art materials and copy
Does not adjust inventory levels and production schedules on a regular basis
Fails to establish appropriate time schedules for bringing new product to market
Publicist

Meets/Exceeds Expectations

- Develops superior press materials and media lists
- Satisfies media requests
- Produces publicity materials that require little editing or correction
- Attentively oversees event planning and media relations
- Maintains comprehensive and current database of contacts
- Drafts company press releases and feature articles
- Plans, develops, and communicates relevant publicity information
- Keeps the public informed of clients’ programs, accomplishments, and points of view
- Serves as a liaison with industry press to maximize publicity
- Diligently maintains the editorial calendar
- Cultivates rich stories for articles
- Successfully creates and distributes press kits
- Regularly attends industry trade shows and press conferences
- Promotes goodwill through publicity efforts
- Excels at organizing charitable events
- Prepares fact sheets, news releases, and photographs for media representatives

Needs Improvement

- Fails to sufficiently research and seek out new media outlets
- Misses opportunities to strengthen and develop media contacts
- Hesitates to participate in industry data-gathering surveys
- Fails to consistently capture and report publicity campaign results
- Does not take the initiative to independently research data
- Fails to proactively contact and court media representatives
Sales Assistant (Brokerage)

Meets/Exceeds Expectations

Successfully provides sales and marketing support
Skillfully handles unsolicited calls from prospects
Consistently follows high standards of business and professional ethics
Work well with high net worth individuals and institutional investors
Coordinates a high volume of administrative support activities
Qualifies new leads according to pre-established guidelines
Successfully schedules appointments for call-ins with account executives
Regularly follows up with referrals, prospects, and clients
Distributes marketing brochures at the direction of sales representatives
Ensures that corporate compliance standards are met
Regularly records all transactions on appropriate logs and blotters
Helps clients complete new accounts and asset transfers
Efficiently handles routine matters, like address changes and bank authorizations
Executes client trades accurately

Needs Improvement

Lacks knowledge of securities industry terminology and practices
Has difficulty preparing sales proposals due to limited software skills
Fails to order and distribute client birthday and holiday cards
Does not track and trend investment fluctuations and variations
Fails to research and resolve client service problems in a timely fashion
Fails to proactively notify sponsor companies when client problems arise
Sales Associate (Retail)

Meets/Exceeds Expectations

Provides exceptional customer service
Promotes retail sales and maximizes revenues
Provides dedicated, one-on-one support to customers
Possesses a creative flair for arranging products in an attractive manner
Ensures that customers receive a distinctive brand experience
Develops lasting customer relationships through clientele building practices
Displays, promotes, tags, and prices merchandise as appropriate
Prepares appropriate promotional signage
Displays merchandise in accordance with company policy
Excels in the areas of merchandising and visual presentation
Ensures that operation standards and loss prevention guidelines are met
Participates in continual sales and customer service training
Consistently achieves customer satisfaction, sales standards, and goals
Has developed a large base of repeat business
Ensures consistent customer satisfaction
Works flexible hours, even on last-minute notice, including weekends
Shows a strong sense of integrity and commitment to customer satisfaction
Accurately operates a retail computer point-of-sale system
Maintains a working knowledge of service and repair operations
Coordinates customer returns and exchanges according to store policy

Needs Improvement

Does not display a positive and outgoing customer orientation
Get easily overwhelmed during peak sales periods
Fails to implement store merchandising standards
Consistently forgets to take advantage of cross-selling opportunities
Does not educate customers on related products, features, and services
Has experienced difficulty in meeting and exceeding individual sales goals
Is reluctant to work at multiple retail locations within the district, as required
Fails to cultivate new customer relationships
Does not regularly follow up with all customers after the sale
Misses opportunities to obtain repeat sales
Sales Manager

**Meets/Exceeds Expectations**

Effectively develops sales, marketing, and revenue plans
Drives future growth and market share
Drives incremental revenue
Develops and executes a coherent business strategy
Recommends short- and long-range business development objectives
Successfully assesses trends, problems, and revenue opportunities
Skillfully articulates the value of our products and services to customers
Responds to questions in real-time
Aggressively implements marketing strategies
Motivates the sales staff
Monitors sales staff performance
Ensures that sales staff receives necessary training
Forecasts and develops annual sales quotas
Consistently projects expected sales volume and profitability
Provides line organization input into pricing proposals
Develops strategies and tactics for new business generation
Coordinates business development and project management initiatives
Regularly develops and introduces technical and management innovations

**Needs Improvement**

Fails to develop successful sales plans
Does not fully understand the economic metrics that drive the business
Is uncomfortable with technology fundamentals
Misses opportunities to build revenue through new partner acquisitions
Shies away from structuring, negotiating, and closing complex deals
Fails to build strategic partnerships
Does not produce reliable and consistent business plans
Is inconsistent in managing the performance of sales staff
Sales Representative (Outside)

**Meets/Exceeds Expectations**

Diligently works an assigned territory to identify business opportunities
Regularly meets with decision makers to analyze customers’ requirements
Consistently employs a consultative, customer-focused sales approach
Excels at obtaining orders and establishing new accounts
Readily recommends changes in products, service, and policy
Makes compelling sales presentations
Gains the attention and involvement of potential customers
Establishes common ground and focuses on win-win outcomes
Readily gains concessions and protects organizational interests
Consistently closes the sale
Addresses customer concerns and moves the customer toward commitment
Skillfully uses territory analysis to target top prospects
Consistently meets or exceeds sales targets
Effectively uses cold calls and networking to generate new referrals
Thoroughly qualifies leads
Builds and maintains customer relationships long after the initial sale
Provides the highest level of customer service support
Uses collaborative selling strategies
Identifies, cultivates, and leverages customer relationships
Demonstrates expert negotiation techniques
Possesses well-honed analytical skills to identify and exploit key opportunities
Instinctively addresses customer concerns with savvy resolution strategies

**Needs Improvement**

Does not consistently meet sales goals
Lacks the business acumen to interpret financial information
Has ongoing difficulties identifying client needs
Lacks expertise in the techniques of collaborative selling
Fails to spontaneously adjust the content or emphasis of sales presentations
Gives up too easily when customers are resistant
Does not retain clear records of submitted orders
Frequently demonstrates resistance to travel throughout the sales territory
Telemarketer

**Meets/Exceeds Expectations**

Generates a high volume of outbound telephone calls  
Renews a high percentage of extended warranty/service contracts  
Remains motivated and eager to cold call sales prospects  
Has a high ratio of sales closes per call  
Demonstrates thorough product knowledge  
Approaches contacts with a pleasant phone voice and gentle persistence  
Sells the sizzle when selling the steak  
Distinguishes between features and benefits  
Actively solicits orders for merchandise and services  
Consistently exceeds the required number of outbound telephone calls  
Records and secures information after each call  
Completes orders entries accurately

**Needs Improvement**

Spends too much time with house accounts rather than new customers  
Frequently runs out of call contacts due to lack of daily preparation  
Has lower quality ratios than average  
Demonstrates reluctance to overcome initial customer objections  
Deviates too often from the script  
Overly apologies for the “intrusion” of his phone call
APPENDIXES
Appendix A: High-Impact Verbs to Inspire Your Writing

The *emphasized* verbs below may lend themselves to describing negative performance issues. Please review them whenever you have to address problematic performance in an appraisal.

A

Accepts
Acclimates
Accomplishes
Accounts (for)
Achieves
Acts (upon)
Adapts
Addresses
Adheres (to)
Adjusts
Administers
Adopts
Advances
Advises
Advocates
Aids
Aligns
Allocates
Allows
Amplifies
Analyzes
Anticipates
Applies
Appoints
Appraises
Appreciates
Approaches
Assembles
Assigns
Assumes (responsibility for)
Assures
Attends
Audits
Augments
Automates
Avoids

B
Balances
Broadens
Budgets
Builds

C
Capitalizes (on)
Captures
Challenges
Clarifies
Coaches
Collaborates (with)
Collects
Combines
Commits
Communicates
Compensates (for)
Compiles
Completes
Complies (with)
Composes
Comprehends
**Compromises**
Conceptualizes
Condenses
Connects (with)
Consolidates
Continues (to)
Contributes
Controls
Cooperates
Coordinates
Counsels
Creates
Cultivates
Customizes

**D**

Deals (with)
Debugs
Dedicates (him/herself to)
Defines
**Delays**
Delegates
Delivers
Demonstrates (mastery of)
Deploys
Designates
Designs
Detects
Determines
Develops
Deviates (from)
Devises
Devotes
Diagnoses
Differentiates (between)
Directs
Disburses
Disciplines
Discounts

Discourages
Dispatches
Displays
Disseminates
Distinguishes
Distributes
Documents

Dominates
Drafts
Draws (attention to)
Drives

E
Edits
Educates
Elicits
Eliminates
Embraces
Employs
Empowers
Enables
Encourages
Enforces
Engages
Engenders
Enhances
Enjoys
Ensures
Epitomizes
Escalates
Establishes
Estimates
Evaluates
Exceeds
Executes
Excels
Exercises
Exhibits
Expedites
Exploits

F

Facilitates

Fails (to)
Familiarizes (himself with)
Flags
Forecasts
Formulates
Fosters

G

Generates
Guides

H

Handles
Harbors
Heightens

Hesitates (to)
Highlights

I
Identifies
Implements
Improves
Incorporates
Increases
Informs
Initiates

Insists (on)
Inspires
Integrates
Institutes
Instructs
Interfaces (with)
Interprets
Investigates

Isolates
Issues Itemizes

J
Justifies

K
Knows

L

Lacks
Leads
Lends
Leverages
Logs

M
Maintains
Makes (sure)
Manages
Masters
Maximizes
Minimizes
Models
Modifies
Monitors
Motivates

N
Navigates
*Neglects*
Negotiates
Notifies
Nurtures

O
Observes
Operates
Optimizes
Orchestrates
Organizes
Overcomes
Oversees
Overwhelms

P
Participates (in)
Plans
Prepares
Possesses

Postpones
Presents
Processes

Procrastinates
Produces
Progresses
Projects
Promotes
Protects
Provides
Publicizes
Purges

Q
Qualifies

R

Rationalizes
Recognizes
Recommends
Reconciles
Records
Redeems
Redirects
Reduces
Refers
Refines

**Refrains (from)**
Reinforces
Rejects
Rejuvenates
Renders
Reports
Represents
Requires
Researches

**Resents**

**Resists**
Resolves
Respects
Responds (to)
Retains
Rewards
Risks
Routes

S
Satisfies
Schedules
Secures
Seeks
Selects
Serves (as)
Shares
Shows
Simplifies
Solicits
Sources
Streamlines
Strengthens
Strives

**Struggles (with)**
Substantiates

**Suffers (from)**
Suggests
Summarizes
Supplies
Supports
Synchronizes
Synthesizes

T

Tailors
Targets
Thrives
Tolerates
Traces
Tracks
Transforms
Translates
Trends
Troubleshoots

U

Unites
Utilizes

V

**Vacillates (between)**
Validates
Verifies
Volunteers

Welcomes
Appendix B: Essential Adverbs to Get Your Message Across

The *emphasized* adverbs below may lend themselves to describing negative performance issues. Please review them whenever you have to address problematic performance in an appraisal.

A

Accurately
Actively
Adequately
*Aggressively*
Always
 Appropriately
Assertively
Attentively

C

Carefully
Cautiously
Chiefly
Clearly
Cleverly
Closely
Collaboratively
Commonly
Completely
Comprehensively
Conscientiously
Consciously
Consecutively
Consistently
Constantly
Constructively
Continually
Continuously
Creatively

D

Deftly
**Deliberately**
Deservedly
Diligently
Directly
Duly

E

Effectively
Efficiently
Enthusiastically
Evidently
**Excessively**

F

Faithfully
Frequently
Fully

G

Generally

H
Habitually
Haphazardly

I
Inadvertently
Inappropriately
Inconsistently
Infrequently
Instinctively
Intentionally
Intermittently

K
Keenly
Knowingly

L
Largely
Logically

M
Masterfully
Methodically
Mistakenly
Mostly

N
Negatively
Never
Normally
O
Objectively
Occasionally
Often
Openly
*Overly*

P
*Partially*
Patiently
Periodically
Positively
Precisely
Predominantly
Proactively
Productively
Proficiently
Progressively
Promptly
Properly
Purposefully
*Purposelessly*

Q
Quickly

R
Rapidly
*Rarely Reactively*
Readily
Regularly
Reliably
Reluctantly
Repeatedly
Respectfully
Responsibly
Rigidly
Routinely

S
Safely
Satisfactorily
Seldom
Sequentially
Skillfully
Smoothly
Sometimes
Specifically
Speedy
Spontaneously
Sporadically
Steadfastly
Steadily
Strategically
Strictly
Strongly
Subjectively
Substantially
Successfully
Succinctly
Suddenly
Swiftly
Systematically

T
Tactfully
Tactically
Thoroughly
Timely
Totally
Truly
Typically

U

Unexpectedly
Uniformly
Unintentionally
Unnecessarily
Usually

V

Vigorously
Voluntarily

W

Willfully
Willingly
Wisely
Appendix C: Common Grading Scale

Although ranking systems differ from company to company, this common five-point scale will provide you with a consistent point of reference when rank-ordering your staff and determining overall performance scores:

5 Clearly outstanding  
4 Consistently exceeds standards and expectations  
3 Consistently meets standards and expectations  
2 Needs improvement  
1 Unacceptable / Unsatisfactory

Merit (salary) increases are typically awarded for individuals who receive overall scores of 3, 4, and 5. Merit increases are denied employees who receive overall scores of 1. Workers who receive an overall score of 2 may be granted another review at a later time (e.g., ninety days later) or be given a very low percentage increase (e.g., 1 percent). However, this may be subject debate depending on company policy and practice. After all, it could be seen as contradictory to award any salary increase to an employee who receives an overall score of 2. When in doubt, always check with qualified legal counsel in your state for a fact-specific analysis and recommendation.
Appendix D: Index of Particular Titles and Roles

A
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Administrative assistant, 176–177
Art director, 201
Assembly and packaging technician, 154–155
Attorney, 146–147
Auditor, 115

B
Benefits administrator, 124–125
Bookkeeper, 116–117

C
Cashier/checker, 202–203
Compensation analyst, 126–127
Contract analyst, 148–149
Controller, 118–119
Credit and collections manager, 120–121
Customer service representative, 178–179

D
Data entry operator, 134–135
Database administrator, 136–137
Distribution manager, 156–157

E
Employee and labor relations representative, 128–129
Equipment technician, 158–159
Event/conference coordinator, 204–205
Executive secretary, 180–181

F
Facilities maintenance supervisor, 182–183
Financial analyst, 122–123
Fundraising/development executive (nonprofit), 206–207

G
Graphic designer, 208–209

H
Help desk coordinator, 138–139

L
Legal secretary, 150–151

M
Machinist, 160–161
Manufacturing supervisor, 162–163
Market research analyst, 210–211
Marketing director, 212–213
Master scheduler, 164–165
Media planner, 214–215

O
Office manager, 184–185

P
Paralegal, 152–153
Product/brand manager, 216–217
Production control assistant, 166
Production lead, 167–168
Production supervisor, 169
Programmer analyst, 140–141
Project manager, 142–143
Publicist, 218–219

R
R&D engineer, 170–171
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S
Safety and security supervisor, 192–193
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