

Assessment and Development: EXPECTED PERFORMANCE

Refer to your online training tools to help with the Goals assessment (Expected Performance). Remember, you are assessing on the employee’s capability, not their previous performance. For each of the following 3 goals below, and their respective metrics that reinforce the goals, assess the employee by indicating using the following **blue 5 point scale**, and then summarizing using the **red 3 point scale**:

- (ND) Likely Needs Development
- (MI) Marginal Improvement Likely Required
- (TAR) Targeted Results are Likely Expected
- (EXD) Will Likely Exceed Targets
- (N/A) Not applicable / Not enough information

- (LBEL) Likely Below Expected Behaviors*
- (LME) Likely Meets Expected Behaviors*
- (LEXD) Likely Exceeds Expected Behaviors*

PRODUCTIVITY (GOAL 1)	ND	MI	TAR	EXD	N/A
Time to Engage	___	___	___	___	___
Time to Source Slate	___	___	___	___	___
Time to Offer Accept	___	___	___	___	___
SUMMARY*: ___ LBEL ___ LME ___ LEXD					

As you considered the assessment for each of these future metrics, what critical points of data did you use to help with this assessment?

- ___ Reports given to you
- ___ Reports / Data provided by the employee
- ___ Direct feedback / input by the employee
- ___ Reports / Data you collected on your own
- ___ Your observation or perception
- ___ Hiring Manager / Client feedback

QUALITY (GOAL 2)	ND	MI	TAR	EXD	N/A
Line of Business Interview Ratio	___	___	___	___	___
Interview to Offer Ratio	___	___	___	___	___
Offer to Accept Ratio	___	___	___	___	___
SUMMARY*: ___ LBEL ___ LME ___ LEXD					

As you considered the assessment for each of these future metrics, what critical points of data did you use to help with this assessment?

- ___ Reports given to you
- ___ Reports / Data provided by the employee
- ___ Direct feedback / input by the employee
- ___ Reports / Data you collected on your own
- ___ Your observation or perception
- ___ Hiring Manager / Client feedback

RELATIONSHIP MANAGEMENT (GOAL 3)	ND	MI	TAR	EXD	N/A
Manager Satisfaction – Overall Process	___	___	___	___	___
Candidate Satisfaction – Overall Process	___	___	___	___	___
Peer Interaction	___	___	___	___	___
SUMMARY*: ___ LBEL ___ LME ___ LEXD					

As you considered the assessment for each of these future metrics, what critical points of data did you use to help with this assessment?



- | | |
|--|---|
| <input type="checkbox"/> Reports given to you | <input type="checkbox"/> Reports / Data you collected on your own |
| <input type="checkbox"/> Reports / Data provided by the employee | <input type="checkbox"/> Your observation or perception |
| <input type="checkbox"/> Direct feedback / input by the employee | <input type="checkbox"/> Hiring Manager / Client feedback |

Assessment and Development: MOTIVATIONS

Refer to your online training tools to help with the Motivations assessment. In this exercise, you should simply place a check next to any statement that you think may deserve attention during the development plan creation. It may deserve attention because you don't know if the employee would agree with this statement or because it is your perception that they would not agree with this statement or you have observed / received feedback about a topic similar to the statement. In any event, simply check a box that may deserve some attention and it will be added to your development plan for consideration.

(X)	STATEMENT
<input type="checkbox"/>	(1) favorite part of the job happens to also be critical to success
<input type="checkbox"/>	(2) finds that professional life matches up with personal life and life events
<input type="checkbox"/>	(3) feels the position offers appropriate amount of creativity for this employee
<input type="checkbox"/>	(4) enjoys the socialization the position creates
<input type="checkbox"/>	(5) handles or mitigates frustrations experienced well
<input type="checkbox"/>	(6) has job that satisfies his / her ego
<input type="checkbox"/>	(7) considers responsibilities exciting, and responsibilities are respected
<input type="checkbox"/>	(8) believes he / she receives enough time to complete the requested work
<input type="checkbox"/>	(9) believes the degree of difficulty in assignments or tasks is appropriate
<input type="checkbox"/>	(10) believes goals are achieved and has sense of satisfaction on completion
<input type="checkbox"/>	(11) finds benefit / perk package appropriate, and uses frequently
<input type="checkbox"/>	(12) thinks the organization puts out a quality product, both in recruiting and LOB
<input type="checkbox"/>	(13) feels variety of tasks and assignments is satisfying
<input type="checkbox"/>	(14) believes in behaviors that are being measured and messaged regularly
<input type="checkbox"/>	(15) finds that the organization accelerates or trains them appropriately for their career
<input type="checkbox"/>	(16) enjoys the pace of the work
<input type="checkbox"/>	(17) feels safe and secure in the working environment
<input type="checkbox"/>	(18) receives direction in such a fashion such that is motivating
<input type="checkbox"/>	(19) likes culture
<input type="checkbox"/>	(20) performs routine tasks without dissatisfaction or urge for change
<input type="checkbox"/>	(21) feels he /she has resident technical expertise to perform the work
<input type="checkbox"/>	(22) believes in the brand, its messaging, and value to the community
<input type="checkbox"/>	(23) in position that offers an appropriate level of growth and / or innovation
<input type="checkbox"/>	(24) performance managed appropriately / receives constructive feedback
<input type="checkbox"/>	(25) is satisfied with the mentoring that is received
<input type="checkbox"/>	(26) enjoys pitching the organization's brand



- | | |
|--|---|
| | (27) finds pay structure and related compensation satisfactory |
| | (28) finds amount of "paperwork" appropriate for the position |
| | (29) has satisfactory amount of learning / training opportunities to attend |

Assessment and Development: BEHAVIORS

Refer to your online training tools to help with the Behaviors assessment. For each of the following 5 behaviors below, assess the employee by considering the supporting tasks, activities, and skills that are typically required. You do not have to assess each individual detail, but we recommend you mark as needed, as it will likely give you great detail in your development plan. Use the following **green 5 point scale for dimensions**, and then summarize using the **red 3 point summary scale**:

- (DEV) Targeted / Potential Development
- (FOU) Foundational
- (INT) Intermediate
- (ADV) Advanced
- (EXP) Expert
- (N/A) Not applicable to role

- (LBEL) Likely Below Expected Behaviors*
- (LME) Likely Meets Expected Behaviors*
- (LEXD) Likely Exceeds Expected Behaviors*

BEHAVIOR 1: Maintains a Proactive Work Style to Achieve Results Consistently

Planning and Organizing

Dimension

Consider these tasks, skills, and activities when assessing Planning and Organizing.

- Multi-tasks _____ Keeps track of activities and records _____
- Sets priorities _____ Performs weekly planning effectively _____
- Handles Disruptions _____ _____

Follow Up

Dimension

Consider these tasks, skills, and activities when assessing Follow Up.

- Tracks assignments effectively _____ Manages timelines and due dates _____
- Monitors vendor activity _____ Double checks on critical assignments / due dates _____

Analysis / Problem Identification

Dimension

Consider these tasks, skills, and activities when assessing Analysis / Problem ID.

- Addresses complicated problems _____ Can obtain information from multiple sources _____
- effectively _____ _____

Attention to Detail

Dimension

Consider these tasks, skills, and activities when assessing Attention to Detail.

- Has a meticulous nature _____ Handles increased pressure while adhering to details _____
- Controls errors and mistake-proofs _____ _____

Innovation

Dimension

Consider these tasks, skills, and activities when assessing Innovation.

- Considers or invents new approaches _____ Understands experimentation and failure (the value) _____
- Able to innovate from a place of _____
- necessity _____

Behavior 1 Summary ___LBEL ___LME ___LEXD



BEHAVIOR 2: Operates with a Focus Founded in and Influenced by the Client Relationship

Customer Service Oriented

Dimension

Consider these tasks, skills, and activities when assessing Customer Service Oriented.

Listens carefully	_____	Understands and knows lessons learned	_____
Handles unreasonable requests	_____		_____

Troubleshooting

Dimension

Consider these tasks, skills, and activities when assessing Troubleshooting.

Handles varying degrees of difficulty well	_____	Reacts effectively to unforeseen problems	_____
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Integrity

Dimension

Consider these tasks, skills, and activities when assessing Integrity.

Negotiates within limits or design	_____	Works within organization policies effectively	_____
Documents at home work accurately	_____	Maintains accuracy consistently	_____
Questions directions effectively	_____		_____

Teamwork / Collaboration

Dimension

Consider these tasks, skills, and activities when assessing Teamwork/Collaboration.

Handles tough teams well	_____	Shares enabling ideas/holds disabling ones	_____
Teaches team members new skills	_____	Introduces and enables new procedures	_____

Rapport Building

Dimension

Consider these tasks, skills, and activities when assessing Rapport Building.

Initiates rapport effectively	_____	Identifies opportunities to start relationship	_____
Remains professional and enabling	_____	Handles difficult or abrasive personalities	_____

Communication

Dimension

Consider these tasks, skills, and activities when assessing Communication.

Uses multiple forms of communication	_____	Explains technical specs to laymen effectively	_____
Formally instructs and teaches	_____	Details policies and procedures clearly in writing	_____
Creates instructions that are easy to follow	_____	Creates effective and powerful status reports	_____

Information Monitoring

Dimension

Consider these tasks, skills, and activities when assessing Information Monitoring.

Investigates competition and trends	_____	Aware of corporate change and information	_____
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Behavior 2 Summary ___LBEL ___LME ___LEXD

BEHAVIOR 3: Services Stakeholders using a Sales Based Skills Set

Persuasiveness & Sales Ability

Dimension

Consider these tasks, skills, and activities when assessing Persuasiveness & Sales Ability.

Handles adversity through tough sales	_____	Uses several sales approaches	_____
Handles difficult situations	_____	Able to cold call effectively and productively	_____

Negotiation

Dimension

Consider these tasks, skills, and activities when assessing Negotiation.

Presents view effectively	_____	Uses multiple techniques	_____
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Collaboration

Dimension

Consider these tasks, skills, and activities when assessing Collaboration.

Asks for help outside group / stakeholders	_____	Crosses departmental boundaries	_____
Effectively networks	_____	Understands value of collaboration	_____

BEHAVIOR 4: Uses Required Technical Skills to achieve predictable results consistently

Technical Knowledge

Dimension

Consider these tasks, skills, and activities when assessing Technical Knowledge.

Advanced knowledge of CRM	_____	Advanced knowledge of LinkedIn Recruiter	_____
Advance research capability in BrassRing	_____	Advanced knowledge of various diversity sourcing methods and tools	_____
Intermediate to advanced knowledge of Google search capabilities	_____	Intermediate to advanced knowledge of Boolean logic / search string methods	_____

Technical Proficiency

Dimension

Consider these tasks, skills, and activities when assessing Technical Proficiency.

Uses CRM tool as instructed to produce SLA for services	_____	Able to teach recruiters that have access to CRM on how to use the tool appropriately	_____
Create all reports using CRM tools as starting point, with little or no editing post creation	_____	Able to adapt to and then leverage various sourcing models, methods, and tools	_____
Able to use LinkedIn Recruiter to populate CRM tool	_____	Able to use CRM and LinkedIn Recruiter as a base of research in order to find NEW contacts	_____
Uses diversity based sources and methods to create divers research and planning	_____	Able to use BrassRing applicants as an integral part of research planning lists and CRM data	_____
Uses CRM tool as primary planning and activity management vehicle	_____	Able to use search string, Boolean logic and Google training to augment CRM, ATS, and other tools for sourcing	_____

Behavior 4 Summary __LBEL __LME __LEXD



BEHAVIOR 5: Leads client service by taking Personal Leadership and ownership of daily work

Tolerance for Stress

Dimension

Consider these tasks, skills, and activities when assessing Tolerance for Stress.

Handles pressure	_____	Executes well with extreme time constraints	_____
Identifies and mitigates stress	_____	Deals with stress produced by customers well	_____
Handles disruption well	_____		

Resilience

Dimension

Consider these tasks, skills, and activities when assessing Resilience.

Copes with disappointment effectively	_____	Meets with poor unexpected feedback effectively	_____
Recovers from dry spells / slumps	_____	Handles disruption well	_____
Overcomes emotions of repeat Unsuccessful prospecting	_____		

Adaptability

Dimension

Consider these tasks, skills, and activities when assessing Adaptability.

Makes quick changes when required	_____	Moves from one group to another well	_____
Orients to new work quickly	_____	Adapts to different management styles	_____

Risk Taking

Dimension

Consider these tasks, skills, and activities when assessing Risk Taking

Calculates risks appropriately	_____	Uses thought to determine risk and acts quickly once assessed	_____
Overcomes influences that inhibit appropriate risk	_____		

Independence

Dimension

Consider these tasks, skills, and activities when assessing Independence

Confident to make decisions independently	_____	Able to go against tradition / legacy	_____
		Can make unpopular decisions and implement	_____

Behavior 5 Summary ___LBEL ___LME ___LEXD

