

Performance Management Problem Person Example

Here is the bottom line first:

The screenshot shows a SharePoint web page titled "Performance Evaluations" for the "Reps Secure" site. The page displays a table of performance evaluations. The table has the following columns: Category, Performance Item and How Measured, Weight, Class, Perf. Period, Superv. Comments / Direction, Superv. Rating, Empl., Weight, and Employment. The data is as follows:

Category	Performance Item and How Measured	Weight	Class	Perf. Period	Superv. Comments / Direction	Superv. Rating	Empl.	Weight	Employment
Evaluation Summary	Performance evaluation discussion took place with Elizabeth on Jan XX, 2008. Her overall evaluation is 2.9 out of 5.	0%	NA	Nov-Jan 2008	Elizabeth needs to address the above items and bring her overall performance rating up to 4.5 before any full transition of her role to selling can take place			0.00	
Needs Improvement	ATTENDANCE, PUNCTUALITY, DEPENDIBILITY. Schedule Planning and time management. Advance notice of time off.	7%	Bonus	Nov-Jan 2008	Elizabeth needs to make sure that her supervisor is confident that she is where she is supposed to be and doing what she is supposed to be doing. This may be through the time tracking system or the call reporting system, or other means acceptable to her supervisor. Plan more in advance as to ensure all customer meetings take place each quarter. Work hours should start no later than 9 am.	2.50		3.50	
*									
		18						100%	58.05

At the bottom of the page, there is a note: "For assistance with Access Web Datasheet, see Help."

Performance Evaluations - Windows Internet Explorer

http://tomingraminc.sharepointsite.net/repshandleman/repsecure/Lists/Performance%20Evaluations/PersonalViews.aspx?PageView=Personal&ShowWebPart={7CF90DEE-677C-4...

Google

Performance Evaluations

TIA SharePoint Home > Reps Secure

Welcome Tom Ingram

Reps Secure

Home

Reps Secure > Performance Evaluations

Performance Evaluations

View All Site Content

Documents

- Shared Documents
- Performance Evaluation Supporting Documents

Lists

- Calendar
- Tasks
- Performance Evaluations
- Captain's Logs

Discussions

- Team Discussion

Sites

People and Groups

Recycle Bin

New Actions Settings

View: All Items

Category	Performance Item and How Measured	Weight	Class	Perf. Period	Superv. Comments / Direction	Superv. Ratir	Empl.	Weij	Empl. Ci
Core Responsibility	CUSTOMER CONTACT: Minimum of quarterly face to face plus ongoing phone / email contact	15%	Salary	Nov-Jan 2008	1 Customer face to face visit in Nov / Dec. for Millstone, 1 for Pampers TRU. No reports filed. Target scheduled in late January. No visit to Kmart, Meijer, Toys R Us Duracell	2.50		7.50	
Core Responsibility	SALES/ADMINISTRATION: Updates monthly sales budget. Aware of hours available to use and maximizes hours through yearly planning. Manages hours in conjunction with Planner.	6%	Bonus	Nov-Jan 2008	Needs to update Account's budgets monthly and keep on top of each account's hours. Must be aware of hours usage, not just plan. Should be reviewed with each account during quarterly visits. Elizabeth has relied on me to provide this information. She does a good job of working with the Planner to plan hours by month on the front end.	2.50		3.00	
Core Responsibility	WRITTEN SERVICE OBJECTIVES: Work with customer to develop written service plan and objectives	10%	Bonus	Nov-Jan 2008	Work produced is good, but work with account earlier so not waiting until last minute to complete. Work in the field a few days a month to see how objectives were carried out and adjust as needed.	3.25		6.50	
Core Responsibility	OPERATIONS RESPONSIBILITIES: Quotes, workorders, project descriptions, instructions, complete, accurate and communicated to operations people on time	9%	Bonus	Nov-Jan 2008	Ensure that quotes are written / approved for all over and above work and sent in a timely manner. Elizabeth is still unsure of this process and when to implement it.	3.75		6.75	
Core Responsibility	MANAGE CUSTOMER TEAM MEMBERS: Oversee part time assistant, work with analyst to ensure reports are processed correctly	6%	Salary	Nov-Jan 2008	Manages part time assistant very well. Needs work more closely with analyst to see that reports are done correctly the first time and to think of new ways to enhance reporting. Utilize this resource.	4.00		4.80	
Core Responsibility	CALL REPORTS: For all face to face customer meetings, enter agenda in SP system prior to meeting, enter meeting summary, customer action points and REPS action points into SP within 2 business days	5%	Bonus	Nov-Jan 2008	Just starting this system. Entered a 3 to give a neutral rating in the overall evaluation	3.00		3.00	
Core Responsibility	ENTER TIME: Enter time into SP system daily	2%	Salary	Nov-Jan 2008	Elizabeth has set a helpful example for others in getting her time entered. Well done.	5.00		2.00	
Core Responsibility	REPORTS TO CUSTOMERS: Transmits customer monthly report to customer within 5 days of receipt from operations. Discusses results with customer and takes appropriate actions, e.o. adjusts survey questions. Enter	5%	Bonus	Nov-Jan 2008	Need the feedback on how reports are being accepted in order to judge this item. How do we need to improve? Are we asking the right survey questions? Create/Implement/Report/Evaluate	3.00		3.00	
18		100%						58.05	

For assistance with Access Web Datasheet, see Help.

Start

3 Adobe A...

Performan...

Public - Win...

http://tomin...

Tom4ARCHI...

Microsoft Po...

Untitled - M...

Document1 ...

Performanc...

3:07 PM

Performance Evaluations - Windows Internet Explorer

http://tomingraminc.sharepointsite.net/repshandleman/repsecure/Lists/Performance%20Evaluations/PersonalViews.aspx?PageView=Personal&ShowWebPart={7CF90DEE-677C-...

Google

Performance Evaluations

TIA SharePoint Home > Reps Secure

Welcome Tom Ingram

Reps Secure

Home

Reps Secure > Performance Evaluations

Performance Evaluations

View All Site Content

Documents

- Shared Documents
- Performance Evaluation Supporting Documents

Lists

- Calendar
- Tasks
- Performance Evaluations
- Captain's Logs

Discussions

- Team Discussion

Sites

People and Groups

Recycle Bin

Category	Performance Item and How Measured	Weight	Class	Perf. Period	Superv. Comments / Direction	Superv. Ratin	Empl.	Weig	Employ. C...
Core Responsibility	REPORTS TO CUSTOMERS: Transmits customer monthly report to customer within 5 days of receipt from operations. Discusses results with customer and takes appropriate actions, e.g. adjusts survey questions. Enter results of discussion in SP Call Report System, including meeting summary and action points for customer and REPS	5%	Bonus	Nov-Jan 2008	Need the feedback on how reports are being accepted in order to judge this item. How do we need to improve? Are we asking the right survey questions? Create/Implement/Report/Evaluate	3.00		3.00	
Core Responsibility	FIELD FEEDBACK: Repsponds to questions from field regarding service objectives within 24 hours (1 business day). Uses feedback to correct and prevent future problems	5%	Bonus	Nov-Jan 2008	Elizabeth responds quickly and effectively	4.50		4.50	
Core Responsibility	RETAIL SERVICE CENTER RESPONSIBILITIES: Manages external work orders, order entry, Siebel system, networks within organization. Must be physically in office 4 out of 5 days during non-travel weeks and in office all non-travel days during travel weeks. Enters time accordingly.	5%	Bonus	Nov-Jan 2008	Elizabeth has done a great job of making REPS indispensable at the RSC. Amy is a very valuable asset and handles most day to day operations. We have not received as much work through the RSC as first anticipated, as most work originates with the Planners.	2.00		2.00	
Core Responsibility	GENERAL ADMIN DUTIES: Completes expense reports on time, attends dept conf calls, participates in pilot projects or other REPS initiatives as requested, etc.	3%	Salary	Nov-Jan 2008	Elizabeth does a good job of submitting expense reports and has been very helpful with the time tracking and P&G sales initiatives	4.50		2.70	
Core Responsibility	NEW BUSINESS DEVELOPMENT: Grows business within existing accounts, including additional product lines. Pro-actively seeks opportunities within each account. Accomplishes specific sales tasks as assigned, on time	8%	Salary	Nov-Jan 2008	Significant new business development has not happened so far. Key Goals Going Forward (per Tom) - Continue P&G contact research within allotted time - Enter new contacts and contact information in Pipeline system as they are identified - Identify 6 target executives for test approach by Jan 14 pipeline call	2.00		3.20	
Special Accomplishment	Elizabeth has persistently championed the opportunity to grow our business significantly within P&G. This has the potential for significant impact on REPS	0%	NA	Nov-Jan 2008		4.00		0.00	
Needs Improvement	COMPUTER SKILLS: Improve skills in V Lookups and other advanced Excel skills	2%	Bonus	Nov-Jan 2008	Elizabeth has excellent computer skills and just needs to work on these more advanced items	4.00		1.60	
18		100%						58.05	

For assistance with Access Web Datasheet, see Help.

Start | 3 Adobe A... | Performan... | Public - Win... | http://tomin... | Tom4ARCHI... | Microsoft Po... | Untitled - M... | Document1 ... | Performanc... | 3:08 PM

Performance Evaluations - Windows Internet Explorer

http://tomingraminc.sharepointsite.net/repshandleman/repsecure/Lists/Performance%20Evaluations/PersonalViews.aspx?PageView=Personal&ShowWebPart={7CF90DEE-677C-...

Performance Evaluations

TIA SharePoint Home > Reps Secure

Welcome Tom Ingram

Reps Secure

Home

Reps Secure > Performance Evaluations

Performance Evaluations

View: All Items

Category	Performance Item and How Measured	Weight	Class	Perf. Period	Superv. Comments / Direction	Superv. Ratin	Empl	Wei	Employ. C
Needs Improvement	COMPUTER SKILLS: Improve skills in V Lookups and other advanced Excel skills	2%	Bonus	Nov-Jan 2008	Elizabeth has excellent computer skills and just needs to work on these more advanced items	4.00		1.60	
Needs Improvement	RECOGNIZES AREAS Where He or She Lacks Needed Knowledge or Skills and Acts to Fill Those Gaps.	4%	Salary	Nov-Jan 2008	Elizabeth needs to spend more time learning work in the field. Needs to better understand the impact of the quality of her work on the field. (Do our Objectives translate into good field work)	2.00		1.60	
Needs Improvement	DEMONSTRATE REPS VALUES	8%	Salary	Nov-Jan 2008	Elizabeth needs to better demonstrate the REPS values of: - Stewardship: Putting the good of the customer and the good of REPS and ahead of personal interest - Entrepreneurial: Elizabeth must find a way to make significant sales progress at P&G without the luxury of having no other duties (for now) - Drive Sales For Customers: Demonstrate passion for driving customer sales, ahead of self interest - Results Over Activity: Results in the admin duties have been average, and results in new sales have been very limited, despite Elizabeth's continuing complaints of being too busy and having too much to do - No Empire Building, No Self Promotion: Needs to demonstrate more cooperation and contribution ahead of serving personal interests	1.50		2.40	
Evaluation Summary	Performance evaluation discussion took place with Elizabeth on Jan XX, 2008. Her overall evaluation is 2.9 out of 5.	0%	NA	Nov-Jan 2008	Elizabeth needs to address the above items and bring her overall performance rating up to 4.5 before any full transition of her role to selling can take place			0.00	
		18						100%	58.05

For assistance with Access Web Datasheet, see [Help](#).

Start | 3 Adobe A... | Performan... | Public - Win... | http://tomin... | Tom4ARCHI... | Microsoft Po... | Untitled - M... | Document1 ... | Performanc... | 3:09 PM