

Performance Evaluation Guide

The purpose of this tool is to guide both the employees filling out their evaluation forms and their supervisors in the proper method of completing the online performance evaluation tool. This guide may be modified in future periods to adapt to the changing nature of our business.

Note: The online form can only take a maximum of 250 words per question. Rephrase your responses if necessary to fit within the limit.

I. Indicate the Evaluation Period (MM/YY – MM/YY) and your Top 5 Projects

a. Evaluation Period

- This information is necessary to inform both the employees and their supervisors of the period being evaluated.
- If the evaluation period is from January 1, 2018 to March 31, 2018, please write “(01/18 – 03/18)”

b. Top 5 Projects

- This information is necessary to remind both the employees and their supervisors of the major projects that employees engaged in during the evaluation period as these ought to be the primary determinants of their performance.
- Over the course of the evaluation period, employees undoubtedly worked on multiple projects. They must be able to classify their work into “projects.”
- Your Top 5 Projects combined ought to have consumed **at least 50%** (approx. 260 hours), but **preferably 75% or more** (approx. 400 hours) of your working hours during the evaluation period. As such, find a way of combining your various tasks into project groups that will allow you to meet this criterion.
- Use the following examples as a guide in crafting project names for purposes of your evaluations:
 - **ETS Examples:**
 - Training Activities for Product XYZ
 - Site Survey Activities for Customer ABC Project (Tuguegarao Site)
 - Installation Activities for Customer ABC Project (Toledo & Mabinay Sites)
 - Commissioning Activities for Customer ABC Project (Balintawak, Radio Room)

** Indicate specific locations in appropriate to remind yourself and your supervisor of the work you accomplished.*

** Separate projects by customer (i.e. even if you were sent to Cebu to (1) upgrade software for Customer A, (2) do a product demo for Customer B, (3) survey a site for Customer C, and (4) install equipment for Customer D, do not combine the 4 activities into a single project)*
 - **FAA Examples:**
 - Procurement of Materials for Customer ABC Project
 - Canvassing of internet plans for the office (4 options)
 - Preparation of Invoices for Various Projects (Customer ABC Project – 3, Customer DEF Project – 2, Customer GHI Project – 1)
 - Preparation of DRs for Various Projects (Customer ABC Project – 3, Customer DEF Project – 2, Customer GHI Project – 1)
 - Management of Job Applicants (26 applicants)
 - Processing of Time Cards for Purposes of Payroll (6 periods)
 - Review of Job Applications on Jobstreet.com (147 applicants processed)

- Processing of Disbursements (3 months)
- Preparation of data for monthly VAT filing (3 months)

** Use units of measurement whenever possible to the amount of work accomplished. (# of applicants, # of months, # of invoices, etc.)*

- **S&M Examples:**

- Collections (**Customer A – 3, Customer B – 1, Customer C – 4**)
- Updates on Customer A Projects (**ABC Project, DEF Project, HIJ Project**)
- Sales of Product A (**Customer A, Customer B, Customer C**)

** All collections done during the period can be grouped as one category. Just indicate all of the customers you did the work for and indicate how many separate collections were done for each.*

** For House Accounts, all ongoing pursuits with the account can be combined together under one project.*

** For Sales of a particular product, different customers can be grouped into a single project.*

c. Amount of Time Committed to Each Project (Hours)

- This information is necessary to inform both the employees and their supervisors whether the employees' Top 5 Projects provides enough coverage to provide meaningful feedback on the employees' performance during the period.
- Assuming there were no holidays during the period, an employee presumably should be working for 528 hours (8 hours / day * 22 working days / month * 3 months)
 - 50% coverage = approx. 260 hours
 - 75% coverage = approx. 400 hours
- Please use the format below
 - Collections (**Customer A – 3, Customer B – 1, Customer C – 4**) => 50 hours
 - Updates on Customer A Projects (**ABC Project, DEF Project, HIJ Project**) => 60 hours
 - Sales of Product A (**Customer A, Customer B, Customer C**) => 200 hours
 - **Total => 310 hours**

II. Metrics

To further simplify the evaluation process, only four general metrics will be used in assessing employees' performance. For each metric, employees are to personally assess as to whether they believe they performed (1) above expectations, (2) at expectations, or (3) below expectations.

After making that assessment, a space is provided where they can expound in 250 words or less as to why they gave themselves such an evaluation. The Company's expectations for each metric is detailed below. It is up to the employee to apply those expectations to at least one of the projects that they indicated above. The more support that you can provide for your assessment, the more likely your supervisor will agree with your assessment. Even if you believe that you performed at or above expectations, if you do not provide sufficient support for your assessment, your supervisor may reduce your rating to below expectations.

Metric 1: Learning Ability

<u>Below Expectation</u>	<u>At Expectation</u>	<u>Above Expectation</u>
<ul style="list-style-type: none"> - You need step by step instructions for all your tasks. - You do not read / study the product manuals. - You do not read / study the product presentations. - You do not pay attention to lectures given by your supervisors. - You ask the same questions repeatedly. - You have difficulty in absorbing lessons taught. - You take too long to absorb lessons being taught. - You do not ask questions when tasks / information received is not clear. - You wait until the last minute to ask questions. - You resist learning new skills / information relevant to your tasks. 	<ul style="list-style-type: none"> - You put thought into asking the right questions (i.e. researching answers to questions before asking). - You attempt to find solutions to problems, but confer with your supervisor before executing them. - You communicate with supervisor when you encounter learning roadblocks. 	<ul style="list-style-type: none"> - You help colleagues by teaching them skills / information acquired from experience. - You proactively learn new skills / information that could benefit the company and share the benefit of those skills / information. - You seek to learn more so that you can assume more responsibility.

Metric 2: Adherence to Office Policies

<u>Below Expectation</u>	<u>At Expectation</u>	<u>Above Expectation</u>
<ul style="list-style-type: none"> - You do not read / study the company manual. - You ask questions should have been clear from the company manual. - You violate company policies detailed on the company manual. - You engage in actions that violate the spirit of the rules listed on the company manual. - You demonstrate a lack of care for company property. - You do not treat your co-workers with respect within the office. - You engage in activities that can hurt the Company's image / reputation. - You bring personal issues into the office. 	<ul style="list-style-type: none"> - You are aware of the policies listed in the company manual. - You abide by the rules in the company manual. - You use the proper channels to communicate any office related issues you may have. - You report any violations of office policies. 	<ul style="list-style-type: none"> - You help educate fellow employees on the company policies. - You engage in activities that promote a healthy working environment.

Metric 3: Quality of Work

<u>Below Expectation</u>	<u>At Expectation</u>	<u>Above Expectation</u>
<ul style="list-style-type: none"> - You do not understand the tasks assigned to you. - You do not accomplish tasks assign to you. - You do not double check your work. - You are not timely in accomplishing the tasks assigned to you. - You have no valid reason for taking longer than expected to accomplish tasks. - You do not display pride in your work. - You cannot explain your work. - You engage in duplicative work. 	<ul style="list-style-type: none"> - You have minimal errors in your work. - You accomplish your work on time. - When you are unsure of a task, you have your work reviewed by your supervisor so that you can be sure that you are on the right track. - You add value to the work product as opposed to just copying what your supervisor says. - You make the work product easy for your supervisor to review / evaluate - You make an effort to produce aesthetically pleasing work product. - You strategize on how you can get the job done more efficiently. 	<ul style="list-style-type: none"> - You rarely have errors in your work product. - You accomplish your tasks ahead of schedule - You complete your tasks under budget - You are constantly generating systems that can help you / others in producing better quality work in the future.

Metric 4: Initiative

<u>Below Expectation</u>	<u>At Expectation</u>	<u>Above Expectation</u>
<ul style="list-style-type: none">- You always need to be reminded of what your tasks are.- You always need to be reminded about your deadlines.- You always need to be advised on the logical next step.	<ul style="list-style-type: none">- You are constantly aware of your tasks and your deadlines.- You advise your supervisor on what you are working on.- You can easily adapt to changing priorities.- You take the next logical step in your tasks without having to be advised by your supervisor.	<ul style="list-style-type: none">- Thinking strategically about projects and proactively discussing with supervisor whether the strategy will improve the project.- Anticipating problems, offering solutions, and their corresponding pros & cons.- You assume more responsibility.

III. How can you improve your performance in the current period?

There is always room for improvement. Identify one or two areas that you can improve on and how you intend to accomplish that improvement.