

INDIVIDUAL DEVELOPMENT PLAN

Name: _____ Manager: _____

Position: _____ Date: _____

Date in Current Position: _____

Section A: Career Plan

Personal Mission Statement

--

Short-Term Career Goals (1-2 years)

Area of Interest / Position Title	Competencies/Skills/ Knowledge Needed: (areas I need to develop)

Long-Term Career Goals (3-5 years)

Area of Interest / Position Title	Competencies/Skills/ Knowledge Needed: (areas I need to develop)

INDIVIDUAL DEVELOPMENT PLAN

Strength to Leverage – select at least <u>one</u> strength to continue to build upon		AREA OF FOCUS:		
<u>Critical Behaviors/Goals</u> What specific behaviors do I need to model or exhibit in this competency or skill?	<u>Developmental Activities/Action Steps</u> (assignments, coaching, formal training) Remember <u>SMART</u>	<u>Manager’s Role</u> (or involvement of others if applicable)	<u>Target Dates/ Milestones</u>	<u>Results/Outcomes</u> How have I succeeded in adapting my behavior or learning new skills? (provide examples)

INDIVIDUAL DEVELOPMENT PLAN

<p><u>Area to Develop</u> – focus on areas to develop that are critical to your performance; select 1 or 2 areas to work on at one time</p>		<p>AREA OF FOCUS:</p>		
<p><u>Critical Behaviors/Goals</u> What specific behaviors do I need to model or exhibit in this competency or skill?</p>	<p><u>Developmental Activities/Action Steps</u> (assignments, coaching, formal training) Remember <u>SMART</u></p>	<p><u>Manager’s Role</u> (or involvement of others if applicable)</p>	<p><u>Target Dates/ Milestones</u></p>	<p><u>Results/Outcomes</u> How have I succeeded in adapting my behavior or learning new skills? (provide examples)</p>

INDIVIDUAL DEVELOPMENT PLAN

<u>Area to Develop</u> – focus on areas to develop that are critical to your performance; select 1 or 2 areas to work on at one time		AREA OF FOCUS:		
<u>Critical Behaviors/Goals</u> What specific behaviors do I need to model or exhibit in this competency or skill?	<u>Developmental Activities/Action Steps</u> (assignments, coaching, formal training) Remember <u>SMART</u>	<u>Manager’s Role</u> (or involvement of others if applicable)	<u>Target Dates/ Milestones</u>	<u>Results/Outcomes</u> How have I succeeded in adapting my behavior or learning new skills? (provide examples)

INDIVIDUAL DEVELOPMENT PLAN

Manager and/or Employee Comments:

Next Development Plan Review Date: _____
(should be every 3-6 months)

INDIVIDUAL DEVELOPMENT PLAN

DEVELOPMENT TIPS:

- **Prioritize.** Identify development areas that will add the greatest value and make a difference.
- **Implement Something Every Day.** Chip away in small bite-sized pieces. Spending even five (5) minutes a day will make development a part of your daily discipline.
- **Seek Feedback and Support.** Learn from others. Ensure that feedback is relevant to your development priorities.
- **Face your Barriers.** Development isn't easy. Address any barriers that may keep you from your development priorities.
- **Involve Others.** Find people who can help you in your development by soliciting ideas and reactions from them and who will provide specific, candid feedback on both your strengths and weaknesses.
- When setting development activities, keep in mind the **SMART** model:
 - S** Specific
 - M** Measurable
 - A** Action Oriented
 - R** Realistic
 - T** Timebound
- **Take Time to Reflect.** Ask yourself what worked and what didn't work, and why.
- **Transfer Learning into Next Steps.** Continue to focus on mastering a specific area, and then share this knowledge by teaching it to others. Regroup and focus on new goals and development activities as appropriate (time period may vary based on specific goals and activities).

Talent Assessment Summary Form -- Instructions/Definitions

Performance Results

Enter the appropriate information for the last three year's Performance Management Program results, starting with the most recent rating listed first.

Career Aspirations

Enter the employee's desired next position(s) in the short term and long term based on previous career discussions held with the employee. Also enter your recommendation for the employee's next position as well as their readiness for that position (i.e., "ready now", "ready 1- years", "ready 3-5 years" or "not applicable").

Leadership Competencies

For each leadership competency listed, place an "X" in the appropriate column to indicate to what extent the individual has demonstrated the specific competency and/or skill set through observed behaviors. Refer to the "Competency Assessment" worksheet tab within the Excel spreadsheet for the comprehensive list of Behavioral Anchored Rating Scales. The "Competency Assessment" worksheet is an optional tool to help you consistently evaluate competency performance.

Core Leadership Values

For each value listed, place an "X" in the appropriate column to indicate if the employee regularly displays the value or if they consistently display the value and teach others. Refer to the "Core Values" worksheet tab within the Excel spreadsheet for definitions of each value being assessed. The definitions are intended to help you consistently evaluate how your employee lives the values. NOTE: Please leave the columns blank if you have concerns about whether or not your employee regularly displays a value and address your concerns in the "Development Needs" section of the form.

Success Inhibitors

As part of the annual Talent Review process, we will proactively discuss and address potential negative behaviors in our talent. Use this section to identify any objective and measurable negative behaviors that could keep the individual from fully utilizing their strengths and may negatively impact their success or potential career advancement.

Attitude Survey Engagement Results:

Enter the employee's department attitude survey results (if applicable) engagement results for the last three years, with the most recent results listed first. Use the comments section to indicate any special circumstances related to the results (i.e., employee was in place less than 3 months when survey was conducted, etc.)

Talent Assessment Summary Form -- Instructions/Definitions

Primary Strengths (list 3-5)

Identify three to five employee strengths in terms of leadership competencies. These should clearly identify the characteristics that differentiate your leader from others in the organization. Ask yourself: Where has the individual been most successful and what skills have contributed to his/her success? In what areas does the individual act as a resource or offer expertise to others? If your leader has completed an external assessment (e.g., EDS, Select International, 360 assessment), their assessment Feedback Report is an ideal source for this information.

Development Needs (list 1-3)

Identify one to three development needs/priorities. These should clearly identify the key strengths that should be further developed or any gaps in behaviors, skills or attributes needed to ensure success at the next level. Ask yourself:

- Where has the individual been least successful and what additional skills/competencies would have been helpful?
- What areas of development would be most impactful to the business and the individual?
- How critical is the skill to the individual, how often will the skill be used, what are the costs involved if the individual does not possess the skill, what would the benefits be if the individual was able to achieve the desired performance?
- What does the individual need to start doing or stop doing to be more successful?
- Once you have determined the development need, does the stated development need describe a change in behavior rather than a business goal?
- Is the development objective realistic yet challenging?

If your leader has completed an external assessment (e.g. 360 assessment), their assessment Feedback Report is an ideal source for this information.

Actions in Next 12 Months (Development Activities)

Identify the key action steps that will be taken to leverage the leader's key strengths or address their development/opportunity areas. Refer to your employees most current development plan as a start. Activities identified on this assessment form should be taken from or incorporated into their development plan with specific dates. Effective development plans follow the 70-20-10 rule for development, where 70% of the activities are on the job assignments, 20% of activities are from feedback/mentoring/networking, and 10% are courses and/or reading. Activities should be built into or be a part of the leader's regular routine, not just one time events, to ensure maximum learning.

Talent Assessment Summary Form -- Instructions/Definitions

Development Results (Previous 12 Months)

Review the leader's most recent development plan and evaluate the individual's development results over the last 12 months in terms of quality and progress. Refer to the "Scoring Development" worksheet tab for objective behaviors to evaluate the development plan. The overall development score field will automatically calculate the average of the quality and progress scores to represent an overall score.

Overall Performance Rating

Use the data on the Talent Assessment Summary form along with your leadership judgment to help you define the individual's Overall Performance Rating based on the definitions:

- A = Exceeds Expectations/Top Achiever - Consistent track
- B = Meets Expectations/Consistently Sound Performance
- C = Improvement Required

Overall Leadership Rating

Use the data on the Talent Assessment Summary form along with your leadership judgment to help you define the individual's Overall Leadership Rating based on the definitions:

- + = Consistently displays all competencies and values and teaches them
- \ = Regularly displays all competencies/values
- = Does not consistently display all competencies and values

Overall Potential Rating

Use the data on the Talent Assessment Summary form along with your leadership judgment to help you define the individual's Overall Potential Rating based on the definitions:

- 1 = High potential. Able to move up and take on more now
- 2 = Promotable. Able to move up/take on more with development
- 3 = Solid contributor/grow in position. Effective at current level
- 4 = Needs development or broadening to continue at current level.

Name: **Employee Name** Title: **Managing Director, Any Department** Emp. #: _____

Performance Results (list most recent PMP, plus previous two PMP results):					Career Aspirations:			
PMP Date	Position	Rating	Overall Score (include decimal value)	Perf. Stds Section Score	Competency Section Score	Employee's Desired Next Position(s):	Short Term:	Long Term:
						Manager's Recommendation for next position and readiness (timeframe)		Ready Now
					Ready within 1-3 yrs			
					Ready within 3-5 yrs			
					Not applicable			

Leadership Competencies:	Needs Development Extraordinary Strength					Core Values to be Assessed:	
How well does person meet competency expectations?:	1 (below)	2 (somewhat)	3 (meets)	4 (more than)	5 (exceeds)	Regularly displays value	Consistently displays value/teaches others
Builds Trust and Respect							
Demonstrates Business & Technology Acumen							
Communicates Effectively							
Meets & Exceeds the Expectations of Customers							
Develops Skills and Abilities of Others							
Demonstrates Accountability							
Inspires Direct Reports							
Creates and Implements a Shared Vision and Strategy							

Success Inhibitors:	Attitude Survey Engagement Results:
In the space below, please identify any objective and measurable negative behaviors that could keep the individual from fully utilizing their strengths and may negatively impact their success or potential career advancement. (For example: does not handle	2008: <input type="text"/> 2007: <input type="text"/> 2006: <input type="text"/> Comments: Good improvement in this area from focus on understanding and raising engagement scores as an SRM

Primary Strengths (list 3-5):	Development Needs (list 1-3):	Actions in Next 12 Months (Development Activities):	Development Results (Previous 12 Months)
			Dev. Quality: <input type="text"/> Dev. Progress: <input type="text"/> Overall Score: <input style="background-color: green;" type="text"/>

Overall Performance Rating		Overall Leadership Rating		Potential Rating	
(A)	Exceeds Expectations/Top Achiever - Consistent track record of high achievement	+	Consistently displays all competencies and values and teaches them to others	1	High potential. Able to move up and take on more now
B	Meets Expectations/Consistently Sound Performance	(\)	Regularly displays all competencies/values	(2)	Promotable. Able to move up/take on more with development
C	Improvement Required	-	Does not consistently display all competencies and values	3	Solid contributor/grow in position. Effective at current level
				4	Needs development or broadening to continue at current level. Potential placement issue

Date Completed: _____
 Completed By: _____ Title: _____

Name: **Employee Name** Title: **Senior Manager, Any Department** Emp. #: **9999999**

Performance Results (list most recent PMP, plus previous two PMP results):						Career Aspirations:		
PMP Date	Position	Rating	Overall Score (include decimal value)	Perf. Stds Section Score	Competency Section Score	Employee's Desired Next Position(s):	Short term:	Long term:
						Manager's Recommendation for next position and readiness (timeframe)		Ready Now
								Ready within 1-3 yrs
								Ready within 3-5 yrs
								Not applicable

Leadership Competencies:	Needs Development ▶ Extraordinary Strength					Core Values to be Assessed:		
How well does person meet competency expectations?:	1 (below)	2 (somewhat)	3 (meets)	4 (more than)	5 (exceeds)	Regularly displays value		Consistently displays value/teaches others
Builds Trust and Respect						People		
Demonstrates Business & Technology Acumen						Service		
Communicates Effectively						Innovation		
Meets & Exceeds the Expectations of Customers						Responsibility		
Develops Skills and Abilities of Others						Loyalty		
Demonstrates Accountability								
Inspires Direct Reports								
Leads Vision and Change								
Solves Problems Through Innovation								

Success Inhibitors:	Attitude Survey Engagement Results:		
In the space below, please identify any objective and measurable negative behaviors that could keep the individual from fully utilizing their strengths and may negatively impact their success or potential career advancement. (For example: does not handle pressure well, does not effectively build teams, disagrees inappropriately with others, does not deliver on their commitments, etc.)	2008:		
	2007:		
	2006:		
	Comments:		

Primary Strengths (list 3-5):	Development Needs (list 1-3):	Actions in Next 12 Months (Development Activities):

Development Results (Previous 12 Months)	
Dev. Quality:	
Dev. Progress:	
Overall Score:	

Overall Performance Rating		Overall Leadership Rating		Potential Rating	
A	Exceeds Expectations/Top Achiever - Consistent track record of high achievement	+	Consistently displays all competencies and values and teaches them to others	1	High potential. Able to move up and take on more now
B	Meets Expectations/Consistently Sound Performance	\	Regularly displays all competencies/values	2	Promotable. Able to move up/take on more with development
C	Improvement Required	-	Does not consistently display all competencies and values	3	Solid contributor/grow in position. Effective at current level
				4	Needs development or broadening to continue at current level. Potential placement issue

Name: **Employee Name** Title: **Manager, Any Department** Emp. #: **9999999**

Performance Results (list most recent PMP, plus previous two PMP results):						Career Aspirations:		
PMP Date	Position	Rating	Overall Score (include decimal value)	Perf. Stds Section Score	Competency Section Score	Employee's Desired Next Position(s):	Short term:	Long term:
							Ready within 1-3 yrs	
							Ready within 3-5 yrs	
								Not applicable

Leadership Competencies:	Needs Development ▶ Extraordinary Strength					Core Values to be Assessed:			
How well does person meet competency expectations?:	1 (below)	2 (somewhat)	3 (meets)	4 (more than)	5 (exceeds)	People	Regularly displays value	Consistently displays value/teaches others	
Builds Trust and Respect							Service		
Communicates Effectively						Innovation			
Meets & Exceeds the Expectations of Customers								Responsibility	
Develops Skills and Abilities of Others						Loyalty			
Demonstrates Accountability									
Solves Problems Through Innovation									
Manages Conflict									
Organizes Effectively									
Works Successfully with Others									

Success Inhibitors:	Attitude Survey Engagement Results:		
In the space below, please identify any objective and measurable negative behaviors that could keep the individual from fully utilizing their strengths and may negatively impact their success or potential career advancement. (For example: does not handle pressure well, does not effectively build teams, disagrees inappropriately with others, does not deliver on their commitments, etc.)	2008:		
	2007:		
	2006:		
	Comments:		

Primary Strengths (list 3-5):	Development Needs (list 1-3):	Actions in Next 12 Months (Development Activities):

Development Results (Previous 12 Months)	
Dev. Quality:	
Dev. Progress:	
Overall Score:	

Overall Performance Rating		Overall Leadership Rating		Potential Rating	
A	Exceeds Expectations/Top Achiever - Consistent track record of high achievement	+	Consistently displays all competencies and values and teaches them to others	1	High potential. Able to move up and take on more now
B	Meets Expectations/Consistently Sound Performance	\	Regularly displays all competencies/values	2	Promotable. Able to move up/take on more with development
C	Improvement Required	-	Does not consistently display all competencies and values	3	Solid contributor/grow in position. Effective at current level
				4	Needs development or broadening to continue at current level. Potential placement issue

Date Completed:
Completed By:

Title:

Revised 7/2006

Nine Blocker

Leadership Talent Assessment

Performance	A			
	B			
	C			
		--	\	+
		Leadership		

*** Individual has less than 12 months in position**

Performance Rating	Leadership Rating	Potential Rating
A = Exceeds Expectations/Top Achiever - Consistent track record of high achievement	+ = Consistently displays all competencies and values and teaches them to others	1 = High potential. Able to move up and take on more now
B = Meets Expectations/Consistently Sound Performance	\ = Regularly displays all competencies/values	2 = Promotable. Able to move up/take on more with development
C = Improvement Required	- = Does not consistently display all competencies and values	3 = Solid contributor/grow in position. Effective at current level
		4 = Needs development or broadening to continue at current level. Potential placement issue

Nine Blocker

Leadership Talent Assessment

Updated: xx/xx/xxxx

Performance	A			
	B			
	C			
		--	\	+
		Leadership		

*** Individual has less than 12 months in position**

Performance Rating	Leadership Rating	Potential Rating
A = Exceeds Expectations/Top Achiever - Consistent track record of high achievement	+ = Consistently displays all competencies and values and teaches them to others	1 = High potential. Able to move up and take on more now
B = Meets Expectations/Consistently Sound Performance	\ = Regularly displays all competencies/values	2 = Promotable. Able to move up/take on more with development
C = Improvement Required	- = Does not consistently display all competencies and values	3 = Solid contributor/grow in position. Effective at current level
		4 = Needs development or broadening to continue at current level. Potential placement issue

Nine Blocker

Leadership Talent Assessment

Updated: xx/xx/xxxx

Performance	A			
	B			
	C			
		--	\	+
		Leadership		

*** Individual has less than 12 months in position**

Performance Rating	Leadership Rating	Potential Rating
A = Exceeds Expectations/Top Achiever - Consistent track record of high achievement	+ = Consistently displays all competencies and values and teaches them to others	1 = High potential. Able to move up and take on more now
B = Meets Expectations/Consistently Sound Performance	\ = Regularly displays all competencies/values	2 = Promotable. Able to move up/take on more with development
C = Improvement Required	- = Does not consistently display all competencies and values	3 = Solid contributor/grow in position. Effective at current level
		4 = Needs development or broadening to continue at current level. Potential placement issue

Assessment of Managing Director Competencies

Name of leader to be assessed:

Position:

Name of person completing assessment:

Position:

Directions: Below you will find eight separate competency and/or skill sets to rate for your MD direct report. In this assessment process you will be determining to what extent the individual has demonstrated the specific competency and/or skill set through observed behaviors.

Builds Trust and Respect

Rating:

Establishing and maintaining effective relationships with employees, coworkers, managers and customers. Trusting people to perform, and being trusted in return. Sharing responsibility and accountability, delegating routine and important work. Recognizing that everyone makes mistakes, including oneself, and not misrepresenting his or her own actions.

No Action Taken to Improve 0	Below Expectations 1	Somewhat Meets Expectations 2	Meets Expectations 3	More than Meets Expectations 4	Exceeds Expectations 5
	<ul style="list-style-type: none"> Shows little interest in and does not put forth the effort required to develop relationships with others at work; is viewed by others as distant or unapproachable. Misrepresents facts, falsifies information, or spins the truth rather than take responsibility for missing goals or making mistakes; does what is easy or expedient rather than what is fair or ethical. Does not provide enough guidance for individuals to be successful, or monitors progress in a way that makes others feel they are not trusted or are being checked up on. Is not considerate of the time or feelings of others; may "play favorites"; is more subjective than objective when making decisions. 		<ul style="list-style-type: none"> Clearly communicates problems and admits mistakes; fulfills commitments and keeps promises. Shares positive outcomes publicly, giving praise to others and recognizing their contributions. Delegates meaningful responsibilities; shows confidence in the abilities of others; helps others reach goals; praises and recognizes the achievements of others. Does not play favorites; treats each person with respect and consideration; takes an objective and fair approach to resolving problems and conflicts. 		<ul style="list-style-type: none"> Takes a genuine interest in each individual with whom he/she works; reaches out to others across the organization to broaden his/her relationship base and achieve greater organizational results. Delegates authority and provides appropriate support based on a keen awareness of others' capabilities, interests, work/life balance and personal goals; Publicly celebrates the successes of others and helps them view failures as opportunities to learn and grow. Is completely open in daily work, modeling expected behaviors demonstrating personal accountability and sound ethics.

Demonstrates Business and Technology Acumen

Rating:

Understanding market pressures that drive the company's business. Understanding and applying knowledge of factors relating to finance, profit/loss statements and other financial documents in order to build a comprehensive business plan for own group. Having knowledge of supply chain, distribution, operating systems and processes (both IT systems and people management), and other factors that effect profitability.

No Action Taken to Improve 0	Below Expectations 1	Somewhat Meets Expectations 2	Meets Expectations 3	More than Meets Expectations 4	Exceeds Expectations 5
	<ul style="list-style-type: none"> Does not understand what impacts profitability, or how. Is extremely challenged when working with complex financial documents. Is unable to discuss business related matters such as cost structure, cash flow, and profitability. Focuses only on the company's immediate need rather than on the big picture and underlying business issues. 		<ul style="list-style-type: none"> Has a good understanding of business and financial concepts and terms (e.g., balance sheet, income statements, etc.). Understands and can utilize technology platforms to assist in planning and decision-making. Understands what and how profitability is impacted at each location for each business unit they supervise and the company as a whole. Understands the industry, marketplace, and possible trends that may affect business outcomes. 		<ul style="list-style-type: none"> Understands business drivers outside of own area and facilitates cross-functional and cross-location opportunities and activities. Speaks competently concerning a wide range of business and financial issues; translates complex business issues into understandable language; is looked to as a business advisor. Explores the big picture business issues before discussing solutions; conducts or is part of business planning; conducts analyses such as ROI in order to support decisions or influence key decision makers. Understands and manages customer expectations as represented in such tools as SQI and other appropriate data points.

Communicates Effectively

Rating:

Expressing thoughts, expectations, ideas and intent effectively and concisely orally, in writing and through gestures and other forms of non-verbal communication. Listening attentively and accurately, even when not agreeing with the opinions of the speaker.

No Action Taken to Improve 0	Below Expectations 1	Somewhat Meets Expectations 2	Meets Expectations 3	More than Meets Expectations 4	Exceeds Expectations 5
	<ul style="list-style-type: none"> Has difficulty articulating and communicating thoughts in a clear manner; is overly wordy or overly short in responses. Does not appear interested in what others have to say; fails to use appropriate verbal and/or nonverbal responses. Does not clearly or consistently convey expectations, targets, or goals. Uses inappropriate language. Does not take into account the cultural perspective of others; sees things only from his/her perspective; does little to ensure common understanding. Does not express self well in written communication. 		<ul style="list-style-type: none"> Uses active listening skills, including maintaining eye contact, reflecting what is heard, not interrupting, and checking for understanding. Accepts and effectively deals with cultural differences such as language, non-verbal behavior, and styles of thinking or communicating. Is able to articulate and communicate thoughts clearly; is neither overly wordy nor overly short. Tries to find a tactful way to express his/her opinions while respecting the differing opinions of others. Consistently uses proper grammar and syntax; avoids using slang or jargon. Translates technical or strategic ideas into information the audience or others can understand. 		<ul style="list-style-type: none"> Speaks and writes in a clear, concise, and direct manner; ideas are presented logically and succinctly. Conducts effective meetings; holds regularly scheduled staff meetings. Uses efficient and appropriate methods to disseminate information, e.g., conference calls, e-mail Always uses active listening skills, including maintaining eye contact, reflecting what is heard, not interrupting, and checking for understanding; realizes that misunderstandings can be caused by differences in values, culture, and other differences. Gauges communication style and methods to the interests and needs of others, using gestures, proper tone, proper visual aides (when required) and non-verbal communication to support the message.

Meets and Exceeds the Expectations of Customers

Rating:

Taking action with the needs in mind of customers inside and outside of the company Seeking information that will improve company services and products. Using the quality process to ensure continuous improvement.

No Action Taken to Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Does not take into consideration how business processes or changes ultimately affect the customer. Is not concerned about the customer's perception of products/services; puts forth minimal effort to understand customer needs before establishing strategies or goals. Does not take the time to determine what the customer needs, and to align business strategies with those needs. Uses inappropriate methods for handling difficult customer interactions; actions may escalate the situation. 		<ul style="list-style-type: none"> Works to ensure that all products and services are meeting/exceeding the expectations of the customers. Encourages employees to seek customer feedback; views feedback as an opportunity for improvement. Assures all tasks and business decisions are ultimately in line with providing the best possible products and services to customers, supporting the Service Culture. Builds a Service Culture mentality within own team by motivating and rewarding those who provide superior service. 		<ul style="list-style-type: none"> Understands the customer's business drivers and aligns products and services to ensure significant value for customers. Continuously looks for ways of doing things better, faster, and at a lower cost while maintaining focus on providing value to the customer. Turns even the most difficult customer situations into a positive experience for the customer and a "win" for the company. Constructively uses customer feedback to evaluate current systems and processes and make recommendations for improvement.

Develops the Skills and Abilities of Others

Rating:

Building the skills and abilities of employees, providing stretching assignments and compelling employees to plan and develop. Accepting development of employees as a building block for organizational success.

No Action Taken to Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Tells people what to do versus engaging them in decision-making to ensure buy-in and commitment. Provides little or ineffective direction, coaching, or support to others as they work toward goals. Takes little action to facilitate the personal development of others; focuses primarily on own personal achievements and career progression; may even thwart the advancement efforts of others. Does not follow-up on development plans; does not reward or recognize successes; reacts negatively to failures of others. 		<ul style="list-style-type: none"> Collaborates with each employee to create a personal development plan with specific objectives, goals, timelines, expectations and measures of results. Provides coaching, an appropriate level of support, and timely feedback. Considers past experience, educational achievement, and assessment of competencies against future positions when building succession plans. Regularly monitors performance plans in order to ensure goal attainment and modify the plan as needed; rewards and recognizes successes; views failures as opportunities to learn and grow. Identifies appropriate business opportunities that will develop the knowledge/skill base for purposes of succession planning. 		<ul style="list-style-type: none"> Engages others in developmental discussions in order to ensure buy-in and to gain commitment to developmental goals. Helps others identify their own personal strengths and weaknesses, and incorporates those into their personal and career objectives. Places a high priority on developing talent within the organization; eagerly serves as a mentor; motivates others to view developmental areas as opportunities to grow and achieve greater successes; challenges others to assume responsibility for personal development. Views development as an ongoing process and continually motivates others to identify growth and learning opportunities. Celebrates each person's small steps toward goal achievement; helps others manage responses to failure by redirecting them to future opportunities.

Demonstrates Accountability

Rating:

Stepping forward to take the lead, even when disapproved of by peers or politically risky to do so. Taking initiative and responsibility in resolving challenging issues and emergency situations. Holding people accountable through clear goals and consistent follow-up.

No Action Taken to Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Is not results focused OR ignores or "works around" established processes and guidelines in order to attain results; accepts responsibility for successes, but blames others and outside forces for failures and errors. Communicates vague expectations, works inefficiently and is unavailable to support others in the pursuit of goal attainment; does not follow-up appropriately and fails to provide timely and accurate feedback regarding successes and failures. Avoids making unpopular decisions and/or is risk averse, which results in maintaining the status quo. Undermines own credibility as a leader by engaging in questionable ethical behavior or using poor judgment. 		<ul style="list-style-type: none"> Follows established processes, standards, and safety guidelines in holding self and others accountable for results; accepts responsibility for failures and errors made by self and the team. Communicates clear expectations, works hard and supports others in the pursuit of goal attainment; monitors progress, implements consequences and delivers rewards as appropriate. Is willing to make unpopular decisions and take reasonable risks in order to meet the best interests of customers and the organization. Uses good judgment and sound business ethics to build a trust and respect as a leader. Consistently applies the above behaviors across all locations he/she supervises. 		<ul style="list-style-type: none"> Participates in the development of processes, standards and safety guidelines that maximize efficiencies and guide others in driving results throughout the organization. Transforms the thinking and work approach of others to focus on results and forward progress; creates an atmosphere where others feel comfortable admitting and learning from mistakes and celebrating successes. Steps up to the plate to resolve challenging problems and provide direction to others, despite potential negative reactions; takes calculated risks that push the organization to the next level. Sets the standard for ethical behavior and sound judgment, thereby building a reputation as trusted leader whose authority is unquestioned.

Inspires Direct Reports

Rating:

Challenging employees to do their best. Recognizing that each person has a unique set of internal motivators and using those motivators to make all employees want to do their best. Demonstrating that the work of every employee is critical to success and inviting each employee to share in the ownership of the unit's performance.

No Action Taken to Improve 0	Below Expectations 1	Somewhat Meets Expectations 2	Meets Expectations 3	More than Meets Expectations 4	Exceeds Expectations 5
	<ul style="list-style-type: none"> Treats every employee as if they had the same personality and motivation, not as individuals. Has difficulty accurately assessing the values, needs, and capabilities of others. Makes decisions without considering the ideas of others or the impact those decisions will have on others. Is unable to effectively set goals for employees and has difficulty motivating employees to work towards goals. 		<ul style="list-style-type: none"> Makes an effort to understand the personality and motivation of each employee. Shares relevant information with employees. Demonstrates trust and belief in the ability of others. Provides rewards and recognition for contributions. Continually keeps team up to date on goal achievement through posting of stats, regular meetings, and other forms of communication. 		<ul style="list-style-type: none"> Inspires others to willingly commit to organizational goals. Continuously solicits input and views of employees for the purpose of building their development plans and providing them opportunities for professional achievement. Treats each employee as an individual with unique talents, interests, and motives. Sets challenging but achievable goals for employees, ensuring that each employee gets the support they need in order to succeed

Creates and Implements a Shared Vision & Strategy

Rating:

Creating, understanding and articulating a detailed picture, direction and future focus for the company, division, or other area of responsibility that is consistent with the higher level vision of the organization and that clearly maps the way for others to some future period. Anticipating future industry trends, determining customer needs, and using this information to develop strategic business plans and goals. Demonstrating the ability to effectively translate strategic goals into appropriate and profitable product and service offerings.

No Action Taken to Improve 0	Below Expectations 1	Somewhat Meets Expectations 2	Meets Expectations 3	More than Meets Expectations 4	Exceeds Expectations 5
	<ul style="list-style-type: none"> Lacks the ability to see future possibilities; provides only mundane or unimaginative suggestions for the future in order to avoid risks, resulting in missed opportunities. Communicates broad visions but has difficulty incorporating specific strategic plans to make that vision a reality. Vision statements and ideas are impractical and irrelevant to the industry. Lacks an understanding of the "big picture"; focuses on internal issues; does not place enough emphasis on external factors affecting the business. Establishes business unit plans that are inconsistent with one another or with the company's overall values, mission and vision; fails to "compete collectively and manage collaboratively". 		<ul style="list-style-type: none"> Creates and communicates a shared vision for the organization, division or group. Clearly understands challenges and limitations to goal achievement, and seeks the best and most ethical way to get beyond the challenges. Understands and tolerates risk and failure; learns from it and moves on quickly. Clearly and effectively translates company's strategy into critical success factors for the business units; ensures business unit goals are aligned with strategy. 		<ul style="list-style-type: none"> Continually considers, seeks and issues innovative ideas; thinks "out of the box"; reframes how people think, and challenges them to think creatively. Takes a broad and long term view of business opportunities and is willing to take calculated risks when developing strategies for future business successes. Maintains a keen understanding of current and future political, social, economic and industry trends that may affect the business; uncovers trends and foresees opportunities that others may miss; uses knowledge and insights to drive innovative strategies. Anticipates obstacles to achieving the vision and develops effective strategies and tactics for overcoming them.

Assessment of Senior Manager Competencies

Name of leader to be assessed:

Position:

Name of person completing assessment:

Position:

Directions: Below you will find eight separate competency and/or skill sets to rate for your MD direct report. In this assessment process you will be determining to what extent the individual has demonstrated the specific competency and/or skill set through observed behaviors.

Builds Trust and Respect

Rating:

Establishing and maintaining effective relationships with employees, coworkers, managers and customers. Trusting people to perform, and being trusted in return. Sharing responsibility and accountability, delegating routine and important work. Recognizing that everyone makes mistakes, including oneself, and not misrepresenting his or her own actions.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Shows little interest in and does not put forth the effort required to develop relationships with others at work; is viewed by others as distant or unapproachable. Misrepresents facts, falsifies information, or spins the truth rather than take responsibility for missing goals or making mistakes; does what is easy or expedient rather than what is fair or ethical. Does not provide enough guidance for individuals to be successful, or monitors progress in a way that makes others feel they are not trusted or are being checked up on. Is not considerate of the time or feelings of others; may "play favorites"; is more subjective than objective when making decisions. 		<ul style="list-style-type: none"> Clearly communicates problems and admits mistakes; fulfills commitments and keeps promises. Shares positive outcomes publicly, giving praise to others and recognizing their contributions. Delegates meaningful responsibilities; shows confidence in the abilities of others; helps others reach goals; praises and recognizes the achievements of others. Does not play favorites; treats each person with respect and consideration; takes an objective and fair approach to resolving problems and conflicts. 		<ul style="list-style-type: none"> Takes a genuine interest in each individual with whom he/she works; reaches out to others across the organization to broaden his/her relationship base and achieve greater organizational results. Delegates authority and provides appropriate support based on a keen awareness of others' capabilities, interests, work/life balance and personal goals. Publicly celebrates the successes of others and helps them view failures as opportunities to learn and grow. Is completely open in daily work, modeling expected behaviors demonstrating personal accountability and sound ethics.

Demonstrates Business and Technology Acumen

Rating:

Understanding market pressures that drive the business. Understanding and applying knowledge of factors relating to finance, profit/loss statements and other financial documents in order to build a comprehensive business plan for own group. Having knowledge of supply chain, distribution, operating systems and processes (both IT systems and people management), and other factors that effect profitability.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Does not understand what impacts profitability, or how. Is extremely challenged when working with complex financial documents. Is unable to discuss business related matters such as cost structure, cash flow, and profitability. Focuses only on the company's immediate need rather than on the big picture and underlying business issues. 		<ul style="list-style-type: none"> Has a good understanding of business and financial concepts and terms (e.g., balance sheet, income statements, etc.). Understands and can utilize technology platforms to assist in planning and decision-making. Understands what and how profitability is impacted at each location for each business unit they supervise and the company as a whole. Understands the industry, marketplace, and possible trends that may affect business outcomes. 		<ul style="list-style-type: none"> Understands business drivers outside of own area and facilitates cross-functional and cross-location opportunities and activities. Speaks competently concerning a wide range of business and financial issues; translates complex business issues into understandable language; is looked to as a business advisor. Explores the big picture business issues before discussing solutions; conducts or is part of business planning; conducts analyses such as ROI in order to support decisions or influence key decision makers. Understands and manages customer expectations as represented in such tools as SQL and other appropriate data points.

Communicates Effectively

Rating:

Expressing thoughts, expectations, ideas and intent effectively and concisely orally, in writing and through gestures and other forms of non-verbal communication. Listening attentively and accurately, even when not agreeing with the opinions of the speaker.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Does not understand what impacts profitability, or how. Is extremely challenged when working with complex financial documents. Is unable to discuss business related matters such as cost structure, cash flow, and profitability. Focuses only on the company's immediate need rather than on the big picture and underlying business issues. 		<ul style="list-style-type: none"> Has a good understanding of business and financial concepts and terms (e.g., balance sheet, income statements, etc.). Understands and can utilize technology platforms to assist in planning and decision-making. Understands what and how profitability is impacted at each location for each business unit they supervise and the company as a whole. Understands the industry, marketplace, and possible trends that may affect business outcomes. 		<ul style="list-style-type: none"> Understands business drivers outside of own area and facilitates cross-functional and cross-location opportunities and activities. Speaks competently concerning a wide range of business and financial issues; translates complex business issues into understandable language; is looked to as a business advisor. Explores the big picture business issues before discussing solutions; conducts or is part of business planning; conducts analyses such as ROI in order to support decisions or influence key decision makers. Understands and manages customer expectations as represented in such tools as SQL and other appropriate data points.

Meets and Exceeds the Expectations of Customers

Rating:

Taking action with the needs in mind of customers inside and outside of FedEx Ground. Seeking information that will improve FedEx Ground services and products. Using the quality process to ensure continuous improvement.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Does not take into consideration how business processes or changes ultimately affect the customer. Is not concerned about the customer's perception of products/services; puts forth minimal effort to understand customer needs before establishing strategies or goals. Does not take the time to determine what the customer needs, and to align business strategies with those needs. Uses inappropriate methods for handling difficult customer interactions; actions may escalate the situation. 		<ul style="list-style-type: none"> Works to ensure that all products and services are meeting/exceeding the expectations of the customers. Encourages employees to seek customer feedback; views feedback as an opportunity for improvement. Assures all tasks and business decisions are ultimately in line with providing the best possible products and services to customers, supporting the Service Culture. Builds a Service Culture mentality within own team by motivating and rewarding those who provide superior service. 		<ul style="list-style-type: none"> Understands the customer's business drivers and aligns products and services to ensure significant value for customers. Continuously looks for ways of doing things better, faster, and at a lower cost while maintaining focus on providing value to the customer. Turns even the most difficult customer situations into a positive experience for the customer and a "win" for the company. Constructively uses customer feedback to evaluate current systems and processes and make recommendations for improvement.

Develops Skills and Abilities of Others

Rating:

Building the skills and abilities of employees, providing stretching assignments and compelling employees to plan and develop. Accepting development of employees as a building block for organizational success.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Tells people what to do versus engaging them in decision-making to ensure buy-in and commitment. Provides little or ineffective direction, coaching, or support to others as they work toward goals. Takes little action to facilitate the personal development of others; focuses primarily on own personal achievements and career progression; may even thwart the advancement efforts of others. Does not follow-up on development plans; does not reward or recognize successes; reacts negatively to failures of others. 		<ul style="list-style-type: none"> Collaborates with each employee to create a personal development plan with specific objectives, goals, timelines, expectations and measures of results. Provides coaching, an appropriate level of support, and timely feedback. Considers past experience, educational achievement, and assessment of competencies against future positions when building succession plans. Regularly monitors performance plans in order to ensure goal attainment and modify the plan as needed; rewards and recognizes successes; views failures as opportunities to learn and grow. Identifies appropriate business opportunities that will develop the knowledge/skill base for purposes of succession planning. 		<ul style="list-style-type: none"> Engages others in developmental discussions in order to ensure buy-in and to gain commitment to developmental goals. Helps others identify their own personal strengths and weaknesses, and incorporates those into their personal and career objectives. Places a high priority on developing talent within the organization; eagerly serves as a mentor; motivates others to view developmental areas as opportunities to grow and achieve greater successes; challenges others to assume responsibility for personal development. Views development as an ongoing process and continually motivates others to identify growth and learning opportunities. Celebrates each person's small steps toward goal achievement; helps others manage responses to failure by redirecting them to future opportunities.

Demonstrates Accountability

Rating:

Stepping forward to take the lead, even when disapproved of by peers or politically risky to do so. Taking initiative and responsibility in resolving challenging issues and emergency situations. Holding people accountable through clear goals and consistent follow-up.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Is not results focused OR ignores or "works around" established processes and guidelines in order to attain results; accepts responsibility for successes, but blames others and outside forces for failures and errors. Communicates vague expectations, works inefficiently and is unavailable to support others in the pursuit of goal attainment; does not follow-up appropriately and fails to provide timely and accurate feedback regarding successes and failures. Avoids making unpopular decisions and/or is risk averse, which results in maintaining the status quo. Undermines own credibility as a leader by engaging in questionable ethical behavior or using poor judgment. 		<ul style="list-style-type: none"> Follows established processes, standards, and safety guidelines in holding self and others accountable for results; accepts responsibility for failures and errors made by self and the team. Communicates clear expectations, works hard and supports others in the pursuit of goal attainment; monitors progress, implements consequences and delivers rewards as appropriate. Is willing to make unpopular decisions and take reasonable risks in order to meet the best interests of customers and the organization. Uses good judgment and sound business ethics to build a trust and respect as a leader. Consistently applies the above behaviors across all locations he/she supervises. 		<ul style="list-style-type: none"> Participates in the development of processes, standards and safety guidelines that maximize efficiencies and guide others in driving results throughout the organization. Transforms the thinking and work approach of others to focus on results and forward progress; creates an atmosphere where others feel comfortable admitting and learning from mistakes and celebrating successes. Steps up to the plate to resolve challenging problems and provide direction to others, despite potential negative reactions; takes calculated risks that push the organization to the next level. Sets the standard for ethical behavior and sound judgment, thereby building a reputation as trusted leader whose authority is unquestioned.

Inspires Direct Reports

Rating:

Challenging employees to do their best. Recognizing that each person has a unique set of internal motivators and using those motivators to make all employees want to do their best. Demonstrating that the work of every employee is critical to success and inviting each employee to share in the ownership of the unit's performance.

No Action Taken to Improve 0	Below Expectations 1	Somewhat Meets Expectations 2	Meets Expectations 3	More than Meets Expectations 4	Exceeds Expectations 5
	<ul style="list-style-type: none"> Treats every employee as if they had the same personality and motivation, not as individuals. Has difficulty accurately assessing the values, needs, and capabilities of others. Makes decisions without considering the ideas of others or the impact those decisions will have on others. Is unable to effectively set goals for employees and has difficulty motivating employees to work towards goals. 		<ul style="list-style-type: none"> Makes an effort to understand the personality and motivation of each employee. Shares relevant information with employees. Demonstrates trust and belief in the ability of others. Provides rewards and recognition for contributions. Continually keeps team up to date on goal achievement through posting of stats, regular meetings, and other forms of communication. 		<ul style="list-style-type: none"> Inspires others to willingly commit to organizational goals. Continuously solicits input and views of employees for the purpose of building their development plans and providing them opportunities for professional achievement. Treats each employee as an individual with unique talents, interests, and motives. Sets challenging but achievable goals for employees, ensuring that each employee gets the support they need in order to succeed.

Leads Vision and Change

Rating:

Translating vision into practical strategy. Inspiring others to embrace change, and to take the necessary steps to implement those changes.

No Action Taken To Improve 0	Below Expectations 1	Somewhat Meets Expectations 2	Meets Expectations 3	More than Meets Expectations 4	Exceeds Expectations 5
	<ul style="list-style-type: none"> Takes a purely tactical approach to setting individual business unit goals and objectives; focuses on developing short-term fixes to immediate problem. Perpetuates a culture where people are more fearful of doing something wrong than doing something right. Conveys only the discomfort with, and disadvantages of, change. Does not recognize areas for improvement, or recognizes them and does not take action to make the improvements 		<ul style="list-style-type: none"> Understands and communicates the future direction of the company and why it is important. Communicates the benefits of change, and continuously provides valuable communication supporting the change effort. Understands the company values, mission and vision and can translate them into actionable plans and strategies. Ensures business unit goals are aligned with the overall corporate strategy; helps to translate strategy into specific tactics and success factors for the business unit. 		<ul style="list-style-type: none"> Translates the vision into strategic action plans, monitors results and makes changes to plans as needed in order to achieve the vision. Communicates clear instruction with respect to how each employee contributes to achieving the vision; instills pride and a strong sense of commitment and unity toward organizational goals. Champions continuous improvements and challenges others to do the same; communicates enthusiasm and conviction regarding future changes. Proactively seeks an in-depth understanding of how each business unit functions both independently and collaboratively.

Solves Problems Through Innovation

Rating:

Identifying and developing unique ways of approaching problems or tasks. Drawing logical inferences and making rational recommendations based on the application of inductive and deductive reasoning skills. Using a creative process to develop original, yet realistic, ideas that meet organizational goals and objectives. Making decisions in a reasonable timeframe that maximize the benefits and minimize the losses.

No Action Taken To Improve 0	Below Expectations 1	Somewhat Meets Expectations 2	Meets Expectations 3	More than Meets Expectations 4	Exceeds Expectations 5
	<ul style="list-style-type: none"> Prefers to follow established processes and apply "tried and true" methods. Employs a "one solution fits all" method of problem solving. Is closed minded with regard to new ideas and new ways of doing things. Analyzes information in a superficial manner with little attention to detail. Formulates recommendations and arrives at decisions without thoroughly reviewing various alternatives and their implications. 		<ul style="list-style-type: none"> Gathers data from all relevant sources before making decisions. Makes decisions in a timely manner; knows when he/she has enough data to make an informed decision. Provides quality recommendations, decisions, and solutions that contribute to the attainment of company goals. Balances creativity and imagination with pragmatism and practicality. Thinks about unique and non-traditional ways to address business issues. Takes an active or lead role in planning and implementing ideas for improvement. 		<ul style="list-style-type: none"> Continually encourages new ideas and explores different approaches to successfully accomplishing goals. Analyzes qualitative and quantitative data in a detailed, thorough manner in order to determine ensure the best possible outcome to decision making, while still making decisions within a reasonable timeframe. Focuses on underlying problems as opposed to symptoms so as to identify long-term solutions to problems. Evaluates various alternatives and their implications prior to recommending a solution.

Assessment of Manager Competencies

Name of leader to be assessed:

Position:

Name of person completing assessment:

Position:

Directions: Below you will find eight separate competency and/or skill sets to rate for your MD direct report. In this assessment process you will be determining to what extent the individual has demonstrated the specific competency and/or skill set through observed

Builds Trust and Respect

Rating:

Establishing and maintaining effective relationships with employees, coworkers, managers and customers. Trusting people to perform, and being trusted in return. Sharing responsibility and accountability, delegating routine and important work. Recognizing that everyone makes mistakes, including oneself, and not misrepresenting his or her own actions.

No Action Taken To Improve	Below Expectations	Somewhat	Meets Expectations	More than	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Shows little interest in and does not put forth the effort required to develop relationships with others at work; is viewed by others as distant or unapproachable. Misrepresents facts, falsifies information, or spins the truth rather than take responsibility for missing goals or making mistakes; does what is easy or expedient rather than what is fair or ethical. Does not provide enough guidance for individuals to be successful, or monitors progress in a way that makes others feel they are not trusted or are being checked up on. Is not considerate of the time or feelings of others; may "play favorites"; is more subjective than objective when making decisions. 		<ul style="list-style-type: none"> Clearly communicates problems and admits mistakes; fulfills commitments and keeps promises. Shares positive outcomes publicly, giving praise to others and recognizing their contributions. Delegates meaningful responsibilities; shows confidence in the abilities of others; helps others reach goals; praises and recognizes the achievements of others. Does not play favorites; treats each person with respect and consideration; takes an objective and fair approach to resolving problems and conflicts. 		<ul style="list-style-type: none"> Takes a genuine interest in each individual with whom he/she works; reaches out to others across the organization to broaden his/her relationship base and achieve greater organizational results. Delegates authority and provides appropriate support based on a keen awareness of others' capabilities, interests, work/life balance and personal goals. Publicly celebrates the successes of others and helps them view failures as opportunities to learn and grow. Is completely open in daily work, modeling expected behaviors demonstrating personal accountability and sound ethics.

Communicates Effectively

Rating:

Expressing thoughts, expectations, ideas and intent effectively and concisely orally, in writing and through gestures and other forms of non-verbal communication. Listening attentively and accurately, even when not agreeing with the opinions of the speaker.

No Action Taken To Improve	Below Expectations	Somewhat	Meets Expectations	More than	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Has difficulty articulating and communicating thoughts in a clear manner; is overly wordy or overly short in responses. Does not appear interested in what others have to say; fails to use appropriate verbal and/or nonverbal responses. Does not clearly or consistently convey expectations, targets, or goals. Uses inappropriate language. 		<ul style="list-style-type: none"> Uses active listening skills, including maintaining eye contact, reflecting what is heard, not interrupting, and checking for understanding; Accepts and effectively deals with cultural differences such as language, non-verbal behavior, and styles of thinking or communicating. Is able to articulate and communicate thoughts clearly; is neither overly wordy nor overly short. Tries to find a tactful way to express his/her opinions while respecting the differing opinions of others. 		<ul style="list-style-type: none"> Speaks and writes in a clear, concise, and direct manner; ideas are presented logically and succinctly. Conducts effective meetings; holds regularly scheduled staff meetings. Uses efficient and appropriate methods to disseminate information, e.g., conference calls, e-mail Always uses active listening skills, including maintaining eye contact, reflecting what is heard, not interrupting, and checking for understanding; realizes that misunderstandings can be caused by differences in values, culture, and other differences. Gauges communication style and methods to the interests and needs of others, using gestures, proper tone, proper visual aides (when required) and non-verbal communication to support the message.

Meets and Exceeds the Expectations of Customers

Rating:

Taking action with the needs in mind of customers inside and outside of company. Seeking information that will improve company services and products. Using the quality process to ensure continuous improvement.

No Action Taken To Improve	Below Expectations	Somewhat	Meets Expectations	More than	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Does not take into consideration how business processes or changes ultimately affect the customer. Is not concerned about the customer's perception of products/services; puts forth minimal effort to understand customer needs before establishing strategies or goals. Does not take the time to determine what the customer needs, and to align business strategies with those needs. Uses inappropriate methods for handling difficult customer interactions; actions may escalate the situation. 		<ul style="list-style-type: none"> Works to ensure that all products and services are meeting/exceeding the expectations of the customers. Encourages employees to seek customer feedback; views feedback as an opportunity for improvement. Assures all tasks and business decisions are ultimately in line with providing the best possible products and services to customers, supporting the Service Culture. Builds a Service Culture mentality within own team by motivating and rewarding those who provide superior service. 		<ul style="list-style-type: none"> Understands the customer's business drivers and aligns products and services to ensure significant value for customers. Continuously looks for ways of doing things better, faster, and at a lower cost while maintaining focus on providing value to the customer. Turns even the most difficult customer situations into a positive experience for the customer and a "win" for the company. Constructively uses customer feedback to evaluate current systems and processes and make recommendations for improvement.

Develops Skills and Abilities of Others

Rating:

Building the skills and abilities of employees, providing stretching assignments and compelling employees to plan and develop. Accepting development of employees as a building block for organizational success.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Tells people what to do versus engaging them in decision-making to ensure buy-in and commitment. Provides little or ineffective direction, coaching, or support to others as they work toward goals. Takes little action to facilitate the personal development of others; focuses primarily on own personal achievements and career progression; may even thwart the advancement efforts of others. Does not follow-up on development plans; does not reward or recognize successes; reacts negatively to failures of others. 		<ul style="list-style-type: none"> Collaborates with each employee to create a personal development plan with specific objectives, goals, timelines, expectations and measures of results. Provides coaching, an appropriate level of support, and timely feedback. Considers past experience, educational achievement, and assessment of competencies against future positions when building succession plans. Regularly monitors performance plans in order to ensure goal attainment and modify the plan as needed; rewards and recognizes successes; views failures as opportunities to learn and grow. Identifies appropriate business opportunities that will develop the knowledge/skill base for purposes of succession planning. 		<ul style="list-style-type: none"> Engages others in developmental discussions in order to ensure buy-in and to gain commitment to developmental goals. Helps others identify their own personal strengths and weaknesses, and incorporates those into their personal and career objectives. Places a high priority on developing talent within the organization; eagerly serves as a mentor; motivates others to view developmental areas as opportunities to grow and achieve greater successes; challenges others to assume responsibility for personal development. Views development as an ongoing process and continually motivates others to identify growth and learning opportunities. Celebrates each person's small steps toward goal achievement; helps others manage responses to failure by redirecting them to future opportunities.

Demonstrates Accountability

Rating:

Stepping forward to take the lead, even when disapproved of by peers or politically risky to do so. Taking initiative and responsibility in resolving challenging issues and emergency situations. Holding people accountable through clear goals and consistent follow-up.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Is not results focused OR ignores or "works around" established processes and guidelines in order to attain results; accepts responsibility for successes, but blames others and outside forces for failures and errors. Communicates vague expectations, works inefficiently and is unavailable to support others in the pursuit of goal attainment; does not follow-up appropriately and fails to provide timely and accurate feedback regarding successes and failures. Avoids making unpopular decisions and/or is risk averse, which results in maintaining the status quo. Undermines own credibility as a leader by engaging in questionable ethical behavior or using poor judgment. 		<ul style="list-style-type: none"> Follows established processes, standards, and safety guidelines in holding self and others accountable for results; accepts responsibility for failures and errors made by self and the team. Communicates clear expectations, works hard and supports others in the pursuit of goal attainment; monitors progress, implements consequences and delivers rewards as appropriate. Is willing to make unpopular decisions and take reasonable risks in order to meet the best interests of customers and the organization. Uses good judgment and sound business ethics to build a trust and respect as a leader. Consistently applies the above behaviors across all locations he/she supervises. 		<p>Participates in the development of processes, standards and safety guidelines that maximize efficiencies and guide others in driving results throughout the organization.</p> <p>Transforms the thinking and work approach of others to focus on results and forward progress; creates an atmosphere where others feel comfortable admitting and learning from mistakes and celebrating successes.</p> <p>Steps up to the plate to resolve challenging problems and provide direction to others, despite potential negative reactions; takes calculated risks that push the organization to the next level.</p> <p>Sets the standard for ethical behavior and sound judgment, thereby building a reputation as being a trusted leader whose authority is unquestioned.</p>

Solves Problems Through Innovation

Rating:

Identifying and developing unique ways of approaching problems or tasks. Drawing logical inferences and making rational recommendations based on the application of inductive and deductive reasoning skills. Using a creative process to develop original, yet realistic, ideas that meet organizational goals and objectives. Making decisions in a reasonable timeframe that maximize the benefits and minimize the losses.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> Prefers to follow established processes and apply "tried and true" methods. Employs a "one solution fits all" method of problem solving. Is closed minded with regard to new ideas and new ways of doing things. Analyzes information in a superficial manner with little attention to detail. Formulates recommendations and arrives at decisions without thoroughly reviewing various alternatives and their implications. 		<ul style="list-style-type: none"> Gathers data from all relevant sources before making decisions. Makes decisions in a timely manner; knows when he/she has enough data to make an informed decision. Provides quality recommendations, decisions, and solutions that contribute to the attainment of company goals. Balances creativity and imagination with pragmatism and practicality. 		<ul style="list-style-type: none"> Continually encourages new ideas and explores different approaches to successfully accomplishing goals. Analyzes qualitative and quantitative data in a detailed, thorough manner in order to determine ensure the best possible outcome to decision making, while still making decisions within a reasonable timeframe. Focuses on underlying problems as opposed to symptoms so as to identify long-term solutions to problems. Evaluates various alternatives and their implications prior to recommending a solution.

- Thinks about unique and non-traditional ways to address business issues.

Manages Conflict

Rating:

Stepping up to address conflict situations. Seeing conflict as a chance to improve processes and achieve goals. Understanding the interpersonal dimensions of disagreement and facilitating or negotiating agreements that settle disputes equitably.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> • Attempts to avoid involvement in conflict situations requiring intervention; leaves it up to the parties involved to "work it out for themselves". • Has difficulty viewing conflict scenarios in an objective manner; becomes emotional and criticizes others for their actions. • Focuses more on "making problems go away" instead of evaluating alternatives and seeking courses of action that will benefit all parties involved. • Ignores or is conflict avoidant; waits and hopes for conflict situations to resolve themselves. 		<ul style="list-style-type: none"> • Stays focused on conflict resolution and avoids personal issues and attacks. • Successfully resolves disagreements and disputes with others. • Listens to both sides of the story and helps the conflicting parties to pinpoint the reason for the conflict. • Knows when it is important to involve a third party, e.g. human resources or legal, in conflict resolution 		<ul style="list-style-type: none"> • Always summarizes discussions and resolution steps to ensure that all parties are aware of and understand agreements and required actions. • Takes positive action to resolve conflicts in a way that addresses issues. Dissipates the conflict, and maintains effective interpersonal relationships. Is viewed as a "go to" person for conflict mediation. • Anticipates possible disagreements, proactively addresses potential misunderstandings and takes action to prevent conflicts. • Presents and seeks out potential approaches or positive courses of action; focuses on identifying win-win solutions.

Organizes Effectively

Rating:

Effectively performing multiple responsibilities simultaneously and/or frequently moving from one activity to another without losing focus. Appropriately planning and prioritizing workload and scheduling time and resources in order to meet deadlines and achieve goals.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> • Prefers to follow established processes and apply "tried and true" methods. Employs a "one solution fits all" method of problem solving. • Is closed minded with regard to new ideas and new ways of doing things. • Analyzes information in a superficial manner with little attention to detail. • Formulates recommendations and arrives at decisions without thoroughly reviewing various alternatives and their implications. 		<ul style="list-style-type: none"> • Gathers data from all relevant sources before making decisions. • Makes decisions in a timely manner; knows when he/she has enough data to make an informed decision. • Provides quality recommendations, decisions, and solutions that contribute to the attainment of company goals. • Balances creativity and imagination with pragmatism and practicality. • Thinks about unique and non-traditional ways to address business issues. • Takes an active or lead role in planning and implementing ideas for improvement. 		<ul style="list-style-type: none"> • Continually encourages new ideas and explores different approaches to successfully accomplishing goals. • Analyzes qualitative and quantitative data in a detailed, thorough manner in order to determine ensure the best possible outcome to decision making, while still making decisions within a reasonable timeframe. • Focuses on underlying problems as opposed to symptoms so as to identify long-term solutions to problems. Evaluates various alternatives and their implications prior to recommending a solution.

Works Successfully with Others

Rating:

Interacting in ways that are socially appropriate and reflect an understanding of and respect for the differences of all individuals. Being sensitive to and valuing the diversity, differences, beliefs and viewpoints of others. Refraining from acting defensively, being confrontational, or using position power to intimidate.

No Action Taken To Improve	Below Expectations	Somewhat Meets Expectations	Meets Expectations	More than Meets Expectations	Exceeds Expectations
0	1	2	3	4	5
	<ul style="list-style-type: none"> • Prefers to work with others who are like him/her; believes that diversity must be tolerated rather than embraced. • Forms conclusions about people before getting to know them. • Does not go out of his/her way to help others; has the attitude of "it's not my job." • Expects people from different cultures and backgrounds to adjust to his/her culture; feels it is not his/her responsibility to make changes or work to understand others 		<ul style="list-style-type: none"> • Readily supplies help, support, and advice to others. • Is aware that misunderstandings can be caused by differences in values, beliefs, cultures and other factors; works to understand and be understood regardless of differences • Determines if colleagues and others need assistance, e.g., to meet an important deadline. • Respects demands, timelines, and priorities of others as well as self. Respects need for work/life balance. 		<ul style="list-style-type: none"> • Is typically open to and willing to shift own perspective when dealing with people who have differing values and beliefs. Is respectful of others, regardless of differences • Places significant value on multi-cultural differences, and sees those differences as an advantage when working on teams or sharing project tasks. • Always takes the time to hear, fully understand, and express value for different ideas and perspectives before drawing conclusions about a situation • Builds an environment where people feel comfortable expressing different opinions. Allows individuals the freedom to challenge the status quo without fear of reprimand or retribution

Core Values Being Assessed

People: We value our people and promote diversity in our workforce and in our thinking.

Service: Our spirit puts our customers at the heart of everything we do.

Innovation: We invent and inspire the services and technologies that improve the way we work and live.

Responsibility: We champion safe and healthy environments for the communities in which we live and work.

Loyalty: We earned the respect and confidence of our employees, customers and investors every day, in everything we do.

**Succession Planning/Bench Chart
for DEPARTMENT NAME Managing Directors**

Incumbents	Reports to: xxxxxx	Reports to: xxxxxx	Reports to: xxxxxx	Reports to: xxxxxx
	Incumbent name Incumbent title Probability of vacancy:	Incumbent name Incumbent title Probability of vacancy:	Incumbent name Incumbent title Probability of vacancy:	Incumbent name Incumbent title Probability of vacancy:
Ready Now				
Ready within 1-3 years	Name Title Rating: Potential: Codes: P, A	Name Title Rating: Potential: Codes: S	Name Title Rating: Potential: Codes: S	
	Name Title Rating: Potential: Codes: S*, N			
Ready within 3-5 years	Name Title Rating: Potential: Codes: S, N	Name Title Rating: Potential: Codes: P	Name Title Rating: Potential: Codes: P	Name Title Rating: Potential: Codes: P

Codes:

P = Primary successor

S = Secondary successor

N = New to position (less than 6 months)

A = Candidate is from another division

O = Candidate is from outside your functional area of responsibility

* Primary second successor

Color Legend:

Reasonable bench; has "ready now" backfill

Marginal bench; candidate not "ready now"

No bench in place or anticipated for more than one year. External sourcing may be required

Succession is based on Equal Employment Opportunities
Succession plans are based solely on present performance and subject to change without notice
Individuals are not guaranteed advancement as a result of plans

**Succession Planning/Bench Chart
for DEPARTMENT NAME Senior Managers**

Incumbents	Reports to: xxxxxx	Reports to: xxxxxx	Reports to: xxxxxx	Reports to: xxxxxx
	Incumbent name Incumbent title Probability of vacancy:	Incumbent name Incumbent title Probability of vacancy:	Incumbent name Incumbent title Probability of vacancy:	Incumbent name Incumbent title Probability of vacancy:
Ready Now				
Ready within 1-3 years	Name Title Rating: Potential: Codes: P, A	Name Title Rating: Potential: Codes: S	Name Title Rating: Potential: Codes: S	
	Name Title Rating: Potential: Codes: S*, N			
Ready within 3-5 years	Name Title Rating: Potential: Codes: S, N	Name Title Rating: Potential: Codes: P	Name Title Rating: Potential: Codes: P	Name Title Rating: Potential: Codes: P

Codes:

P = Primary successor

S = Secondary successor

N = New to position (less than 6 months)

A = Candidate is from another division

O = Candidate is from outside your functional area of responsibility

* Primary second successor

Color Legend:

Reasonable bench; has "ready now" backfill

Marginal bench; candidate not "ready now"

No bench in place or anticipated for more than one year. External sourcing may be required

Succession is based on Equal Employment Opportunities
Succession plans are based solely on present performance and subject to change without notice
Individuals are not guaranteed advancement as a result of plans

Potential Success Inhibitors

Explanation: Success Inhibitors are characteristics that if present, can stall or sometimes even stop a career. They are most often related to issues of self management and can keep a leader from fully leveraging his/her strengths.

Directions: Below you will find listed possible success inhibitors for you to assess or consider. These are written in a negative tone as it is the presence of the negative that is to be assessed. Place an "X" in the appropriate category to indicate if the derailer is a concern of some kind and to what extent. If none of the derailers are present, you will check "Not Applicable".

SUCCESS INHIBITORS <i>(mark only one box per inhibitor)</i>	Not Applicable	Caution	Concern
Poor Attention to Detail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> - Fails to show due attention, consideration, or thoroughness. - Not rigorous or meticulous resulting in errors or omissions. - Lacks order or a methodical approach. 			
Overly Competitive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> - Overly motivated by ambition; strives solely for victory or superiority. - Demands a position of distinction or merit, especially when unjustified. - Displays antagonistic behavior resulting in opposition or resistance. 			
Lacks Poise or Self-confidence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> - Lacks composure in stressful situations. - Reacts defensively when challenged. - Conveys a state of uneasiness, apprehension, or insecurity. 			
Does Not Foster Trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> - Fails to adhere to promises, obligations, or allegiances. - Engages in evasive behavior; intentionally vague or ambiguous. - Inconsistent in communication and action. 			
Lacks Personal Accountability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> - Fails to accept responsibility or hold oneself responsible. - Not willing to admit failures; displaces blame. - Claims to be solely following directives from upper management. 			
Narrow Focus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> - Lacks breadth of view; narrow-mindedness. - Lacks foresight; fails to plan prudently for the future. - Easily engrossed in one line of thought or action. 			
Inflexibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> - Resists change; stubbornly adheres to an opinion or course of action. - Fails to adjust interpersonal style or adapt to novel situations. - Not willing to make concessions; uncompromising. 			

Rating Scale for Development Plan Quality: Measures the strength of the development plan itself

0	1	2	3	4	5
<p>No development plan in place</p>	<p>No direct link is present between "Personal Mission," organizational goals, and development plan</p> <p>Plan is focused on too few or too many areas of strength and development</p> <p>Development areas are not directly related to a FXG competency or supporting behaviors</p> <p>Most identified development activities are related to lack of acceptable performance in current job responsibilities</p> <p>Development in selected areas will have negligible impact on personal behavior change or business goals</p> <p>Selected areas were chosen for simplicity, ease, or solely business metrics impact rather than personal/leadership development</p> <p>Depth and detail in selected development activities lack rigor and specificity</p> <p>Activities are based only on classes to attend or books to read</p> <p>The plan is too short-term focused, with tasks to check off the list, or too long-term focused with no opportunity for mid-term progress indicators</p> <p>Successful progress on identified actions has not been identified</p>		<p>Obvious link is present between "Personal Mission," organizational goals, and development plan</p> <p>Plan is focused on no more than two development priorities, and one key area of strength</p> <p>Development in selected areas will have an impact on personal behavior change and business goals</p> <p>Desired actions and outcomes are specific, attainable, and stated in behavioral terms</p> <p>Development areas are directly linked to FXG competencies and behaviors</p> <p>Activities clearly indicate where and when action will be taken</p> <p>The activities listed are more focused on-the-job rather than on classroom or reading. 70% of the activities identified should be focused on behavior change in regular work or special projects, 20% on getting feedback or coaching from others, and only 10% on classroom learning or reading</p> <p>The plan lists activities that cover a 3-6 month time period. In general, progress in completing the activities can be accomplished through daily or weekly focus and implementation</p> <p>The listed activities create meaningful challenge</p> <p>Successful progress on identified actions has been clearly defined</p>		<p>Very clear link is present between "Personal Mission," organizational goals, and development plan. "Personal Mission" statement reflects holistic approach to life, incorporating both work and personal components</p> <p>Development in selected areas will have optimal impact on personal behavior change and business goals; these impacts have been carefully chosen and indicated in plan</p> <p>Strength area selected is focused on teaching/coaching others in this area for maximum learning for others, and will positively benefit the organization/individuals involved if successfully carried out and completed</p> <p>Activities clearly indicate where and when action will be taken. Steps are built into the plan to allow time to reflect on actions and extract maximum learning</p> <p>Depth and detail in selected development activities is rigorous and creative. Activities reflect a willingness to go beyond the current job to learn new skills and stretch capabilities</p> <p>All other "3" standards have been met</p>

Development plan updates were not submitted timely, or were not changed or updated since the previous submission

Development plan updates were submitted on time

Rating Scale for Development Progress: Measures actions & behavior change due to development efforts

0	1	2	3	4	5
<p>No development effort was extended; no actions were taken, updated or added due to lack of interest, not making time, or other reasons</p>	<p>Did not seek or receive feedback from manager or others on development areas</p> <p>Completed only those development activities related to lack of acceptable performance in current job responsibilities</p> <p>Completed only those development areas that were easiest to achieve, or those based solely on increasing business metrics rather than personal/leadership development</p> <p>Did not take development efforts seriously, as evidenced through meager development plan, lack of activity, or focus only on attending classes and reading books</p> <p>Did not demonstrate any behavior change in identified areas of development</p> <p>Did not update or identify progress on development activities or actions. Did not add new activities once original actions were complete</p> <p>Does not discuss development with direct reports. Does not place emphasis on or understand the importance of continuous learning for the long-term benefit of employees and the organization</p> <p>Speaks negatively or complains about the "burden" of employee performance management and development</p>	<p>Identified selected people to provide support and feedback on development. Took action to gain feedback from these selected people at least once between development plan updates</p> <p>Scheduled development progress reviews with manager</p> <p>Took intelligent risks in the spirit of development</p> <p>Faced barriers head on to ensure continued progress</p> <p>Took time to reflect on actions and extract maximum learning</p> <p>Demonstrated evident behavior change in selected development areas as seen through regular people interactions and job responsibilities</p> <p>Updated follow-up/progress on identified actions. Identified completed activities with appropriate progress indicators and desired outcomes</p> <p>Identified additional development actions or goals between plan updates to sustain continuous development</p> <p>Conducts development discussions regularly with all direct reports</p> <p>Holds direct reports accountable for development of their teams</p>	<p>Identified selected people to provide support and feedback on development. Took action to gain feedback from these selected people at least once between development plan updates</p> <p>Scheduled development progress reviews with manager</p> <p>Took intelligent risks in the spirit of development</p> <p>Faced barriers head on to ensure continued progress</p> <p>Took time to reflect on actions and extract maximum learning</p> <p>Demonstrated evident behavior change in selected development areas as seen through regular people interactions and job responsibilities</p> <p>Updated follow-up/progress on identified actions. Identified completed activities with appropriate progress indicators and desired outcomes</p> <p>Identified additional development actions or goals between plan updates to sustain continuous development</p> <p>Conducts development discussions regularly with all direct reports</p> <p>Holds direct reports accountable for development of their teams</p>	<p>Actively sought feedback from a wide pool of others on development areas and progress</p> <p>Identified and completed activities that reflect a willingness to go beyond the current job to learn new skills and stretch capabilities</p> <p>Built clear steps into the plan to allow time to reflect on actions and extract maximum learning. Used those learnings for additional development insight and activity planning</p> <p>Places an evident, strong focus on personal continual learning and development</p> <p>Has/had a positive impact on the larger functional area or business through personal behavior change in selected development areas</p> <p>Has increased the effectiveness of functional area due to his/her continuous focus on employee learning and development</p> <p>Talks about the importance of creating a development culture for the continued success of our people and the organization</p> <p>All other "3" standards have been met</p>	

Development Results (Previous 12 Months)

Development Quality:	2
Development Progress:	3
Overall Score:	2.5