

# PERSONNEL NOTEBOOK

For Your Most Important Resource—The Human Resource

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## The Performance Evaluation Part VIII — More Job Title Evaluations

In our series on Performance Evaluation, we continue with the concept of identifying evaluators to use for specific job titles. These evaluators are meant to be guides along the course of your performance evaluations. You should consider whether to add any qualities or requirements in any specific job. You may have additional or different expectations. As long as the employee knows what is expected, those expectations should be added to these guides.

Our series has to date included the following titles:

- Part I — The 10 Most Common Mistakes
- Part II — The Biggest Mistake
- Part III — Understanding and Being Understood
- Part IV — More Understanding and Being Understood
- Part V — Understanding More and Being Understood More
- Part VI — Evaluating By Job Title
- Part VII — More Evaluating By Job Title

In this issue we will cover the job titles of sales manager-sales representative-administrative assistant, executive secretary and office manager.

### V. Sales

#### **Sales Manager**

##### Meets / Exceeds Expectations

- Effectively develops sales, marketing, and revenue plans
- Drives future growth and market share
- Drives incremental revenue
- Develops and executes a coherent business strategy
- Recommends short-and long-term development objectives
- Successfully assesses trends, problems, and revenue opportunities
- Skillfully articulates the value of our products and services to customers
- Aggressively implements marketing strategies
- Motivates the sales staff
- Monitors the sales staff performance
- Ensures the sales staff receives necessary training

- Forecasts and develops annual sales quotas
- Consistently projects and accomplishes expected sales volume and profitability

#### Needs Improvement

- Fails to develop successful sales plans
- Does not fully understand the economic metrics that drive our business
- Is uncomfortable with fundamental technology
- Misses opportunities to build revenue through strategic partnering
- Shies away from structuring, negotiating, and closing complex deals
- Does not produce reliable and consistent business plans
- Is inconsistent in managing the performance of sales staff

#### **Sales Representative (Outside)**

##### Meets / Exceeds Expectations

- Diligently works an assigned territory to identify business opportunities
- Regularly meets with decision makers to analyze customer's requirements
- Consistently employs a consultative, customer-focused sales approach
- Excels at obtaining orders and establishing new accounts
- Readily recommends changes in products, service, and policy
- Makes compelling sales presentations
- Gains the attention and involvement of potential customers
- Establishes common ground and focuses on win-win outcomes
- Readily gains concessions and protects organizational interests
- Consistently closes the sale
- Addresses customer concerns and moves the customer towards commitment

- Skillfully uses territory analysis to target top prospects
- Consistently meets or exceeds sales targets
- Effectively uses cold calls and networking to generate new referrals
- Thoroughly qualifies leads
- Builds and maintains customer relationships long after the initial sale
- Provides the highest level of customer service support
- Uses collaborative selling strategies
- Identifies, cultivates, and leverages customer relationships
- Demonstrates expert negotiation skills to identify and exploit key opportunities

#### Needs Improvement

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

## **VI. Administration**

#### **Administrative Assistant**

##### Meets / Exceeds Expectations

- Does a very thorough job administering office services
- Effectively maintains the workflow in department

- Quickly resolves administrative problems
- Provides consistent customer support
- Ensures that all clients are treated with the utmost respect and professionalism
- Thoroughly plans, organizes, and schedules department's workload
- Flags hot issues that require management's immediate attention
- Proofreads and edits documents, and makes necessary corrections
- Maintains an up-to-date, organized file system
- Excels at coordinating a high volume of meetings
- Keeps supervisor informed of updates and last-minute changes in schedule
- Highlights pertinent articles in trade journals and on the Internet
- Consistently monitors office inventories and anticipates needed supplies

#### Needs Improvement

- Falls behind in processing expense reports
- Fails to screen calls effectively
- Misspells caller's names and transposes phone numbers
- Has difficulty prioritizing workload
- Maintains a disorganized desk
- Has difficulty locating necessary documents on short notice
- Causes unnecessary delays by having to do things twice
- Requires a concrete outline of specific instructions
- Fails to keep supervisor informed of schedule changes
- Mislabels files and misses typos in correspondences and reports
- Pays too little attention to details
- Has not tried to advance her/his technical knowledge and skills

### **Executive Secretary**

#### Meets / Exceeds Expectations

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

#### Needs Improvement

- Has difficulty working for more than one boss
- Is reluctant to say "no" when appropriate
- Does not regularly proofread or edit final drafts

- Commits too many grammar and spelling errors
- Fails to maintain an organized and up-to-date filing system
- Requires temporary back-up support too often
- Has difficulty managing supervisors calendar and coordinating travel schedule
- Demonstrates resistance when asked to answer others telephones
- Requires repeated instructions and close supervision

### **Office Manager**

#### Meets / Exceeds Expectations

- Ensures the proper flow of work throughout the office
- Manages the dual role of supervising staff and maintaining offices systems
- Ensures a high level of office staff performance
- Forecasts the administrative and operational needs of the office
- Accurately schedules office expenditures
- Constructs action procedures that others can follow in his/her absence
- Serves as a jack-of-all-trades
- Accurately maintains petty cash and stocks of office supplies
- Troubleshoots hardware and software problems
- Regularly prepares and manages office support attendance
- Processes payroll without error
- Administers equipment purchase, rental, and repair

#### Needs Improvement

- Has difficulty confronting subordinates performance problems
- Alienates other support staff members who do not report to him/her

- Clearly prefers the technical over the people-oriented aspects of the job
- Lacks an advance level of computer proficiency
- Is rarely willing to work overtime
- Resists needed changes or improvements
- Shows favoritism to certain members of the team
- Avoids mail sorting or supporting others
- Fails to follow established policy and protocol

In our next issue of *Personnel Notebook*, we will continue our series on performance evaluation, with more suggested evaluators for appraising specific job titles.

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