

# PERSONNEL NOTEBOOK

For Your Most Important Resource—The Human Resource

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## The Performance Evaluation Part IX—Evaluation By Job Continued

In this, Part IX of our series on Performance Evaluations, we will continue with our guide for evaluating performance by job title, as opposed to evaluating by generic functions.

Our series to date has 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
- Part VIII — More Job Title Evaluations

In this issue, we will cover the job titles of Fundraiser, Event Coordinator, Account Executive, Customer Service Representative, and Graphic Designer.

### **Fundraiser / Development Executive (Nonprofit)**

#### Meets / Exceeds Expectations

- Responsibly oversees the planning and execution of all fundraising
- Manages the solicitation and stewardship of major gift prospects
- Devises strategies for achieving fundraising goals
- Develops contributed financial support, including memberships and grants
- Serves as liaison with news media for exhibitions and special programs
- Demonstrates outstanding leadership in working with boards of directors
- Skillfully organizes and coordinates social and special events
- Continuously solicits corporate underwriters and in-kind donations
- Diligently oversees annual membership drives
- Spearheads membership drives including direct mail and telephone solicitations
- Instills trust and loyalty in clients and contributors

### Needs Improvement

- Does not possess comprehensive fundraising or grant-writing skills
- Neglects the development of planned giving and endowment initiatives
- Lacks knowledge of intestacy laws and estate planning
- Has difficulty structuring and conducting planned-giving campaigns
- Is not familiar with credit trusts and wealth replacement trusts
- Has not consistently met fundraising and development targets

### **Event / Conference Coordinator**

#### Meets / Exceeds Expectations

- Successfully processes seminar and convention registrations
- Accurately records payments for registrants, exhibitors, and sponsors
- Prepares name badges and event registration rosters without error
- Assists in managing the logistics of speaker presentations
- Diligently books guests and meeting rooms
- Ensures the timely distribution of promotional materials for seminars
- Coordinates the collection, compilation, and packaging of speakers notes
- Assists in the management of volunteer corps
- Regularly maintains seminar, conference, and convention events schedules
- Distributes participant continuing-education forms
- Obtains state licensing board continuing-education credit approval for seminars
- Willingly assists in all levels of pre-conference planning
- Ensures that meeting rooms are properly equipped

- Coordinates all aspects of on-site signage and audiovisual requirements

### Needs Improvement

- Fails to consistently coordinate catering and audiovisual requirements
- Lacks a basic knowledge of event and meeting planning principles
- Is slow to wrap up post-conference financial settlement of invoices
- Is not familiar with the operational requirements for audiovisual equipment
- At times, appears resentful of early morning, evening, and weekend hours

### **Account Executive**

#### Meets / Exceeds Expectations

- Excels at identifying and closing new sales prospects
- Engages in a consultative selling style
- Continuously meets or exceeds sales expectations
- Generates a high number of leads through cold calling and personal referrals
- Sets the appropriate number of sales activities to meet performance targets
- Always puts the customer's needs above the need to close the sale
- Makes the greatest number of sales presentations month after month
- Tracks the quality ratios of sales calls to maximize each territory's potential
- Develops and follows a well-researched client development plan
- Remains in the top 10 percent of account executives in terms of revenues
- Sees each sale through to the client's satisfaction
- Maintains accurate records of cold calls, presentations, and sales results
- Proactively identifies current and future customer service requirements

- Secures profitable, high margin business
- Has a very high retention and repeat-business rating

#### Needs Improvements

- Does not proactively identify and evaluate unexploited assets or revenue sources
- Has not consistently met monthly sales quotas
- Spends too much time chasing low margin business
- Shies away from negotiating complex deals
- Cannot effectively articulate competitors strengths and weaknesses
- Fails to pursue opportunities for account growth and new business development
- Fails to close major business deals within his assigned territory
- Has difficulty developing industry relations and networks

#### **Customer Service Representative** Meets / Exceed Expectations

- Excels at serving customers
- Provides product and services information in a timely fashion
- Readily resolves product and services discrepancies
- Enhances customer's sales and purchasing satisfaction
- Consistently recommends ways to improve customer service
- Creates a welcome and open dialogue with prospects
- Questions prospects appropriately
- Presents products and services on a problem-to-solution basis
- Continuously evaluates customer feedback and recommendations
- Delivers efficient service and high quality

- Possesses a detailed knowledge of formal agreements with customers and vendors
- Effectively translates customer requirements to match our system
- Resolves inquiries regarding order status and general product information
- Regularly resolves billing errors via debit and credit memos
- Qualifies new customers in terms of ordering ability
- Rapidly investigates errant shipments and storage inquiries
- Diagnoses the causes of problems and selects the best solutions

#### Needs Improvement

- Frequently fails to resolve customers problems in a timely manner
- Does not proactively act on customers' suggestions
- Fails to bring problematic customer issues to management's attention
- Appears to cover up service issues rather than share them
- Does not submit product and service reports by established deadlines
- Demonstrates an insufficient knowledge of the online data entry system
- Commits excessive errors when documenting customer, product, and/or service data or change orders
- Sometimes fails to gain permission for amended orders
- Lacks sufficient knowledge of our updated products and services
- Continues to misdiagnose basic customer inquiries
- Does not currently meet outbound call volume benchmarks
- Fails to qualify prospective customers
- Fails to ask questions that are critical to the sale

- Does not listen attentively to customer's needs

In Part X, we will complete our series on Performance Evaluations.

## **Graphic Designer**

### Meets / Exceeds Expectations

- Provides graphic design and graphics production support
- Promptly completes layout revisions
- Optimizes and retouches graphics
- Creatively illustrates concepts
- Successfully designs rough layout of art and copy
- Has a good sense of appropriate graphic size, style, and arrangement
- Makes edits and changes to file in a timely and efficient manner
- Is flexible and willing to experiment with color, contrast, and backgrounds
- Develops new and exciting patterns and designs
- Successfully launches special design projects
- Implements art direction and design concepts across a range of projects
- Consistently verifies size, color, and other production-related issues
- Reliably executes graphic output for single-color and multicolor ads and promotions
- Processes form orders in accordance with eligibility guidelines

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### Needs Improvement

- Lacks necessary Web and HTML coding skills
- Is technically challenged in the areas of scanning and image production
- Fails to maintain graphic design equipment in proper working order
- Fails to regularly purge files of forms that are no longer in use
- Does an unsatisfactory job maintaining archival creative job files