



## Annual Performance Review **Sally Sales**

**Performance Review Report**  
9/11/2014

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## Review Details

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Employee:	<b>Sally Sales</b>
Position:	<b>Sales Person</b>
Reviewer(s):	<b>David Director</b> (Form Complete) <b>Sally Sales</b> (Form Complete) <i>Self-evaluation</i>
Review Form:	<b>Annual Performance Review</b>
Date:	<b>1/17/2014</b>
Digital Signatures:	<b>Sally Sales</b> (Signed 9/10/2014 7:39:00 PM) <b>David Director</b> (Signed 9/10/2014 7:42:00 PM)

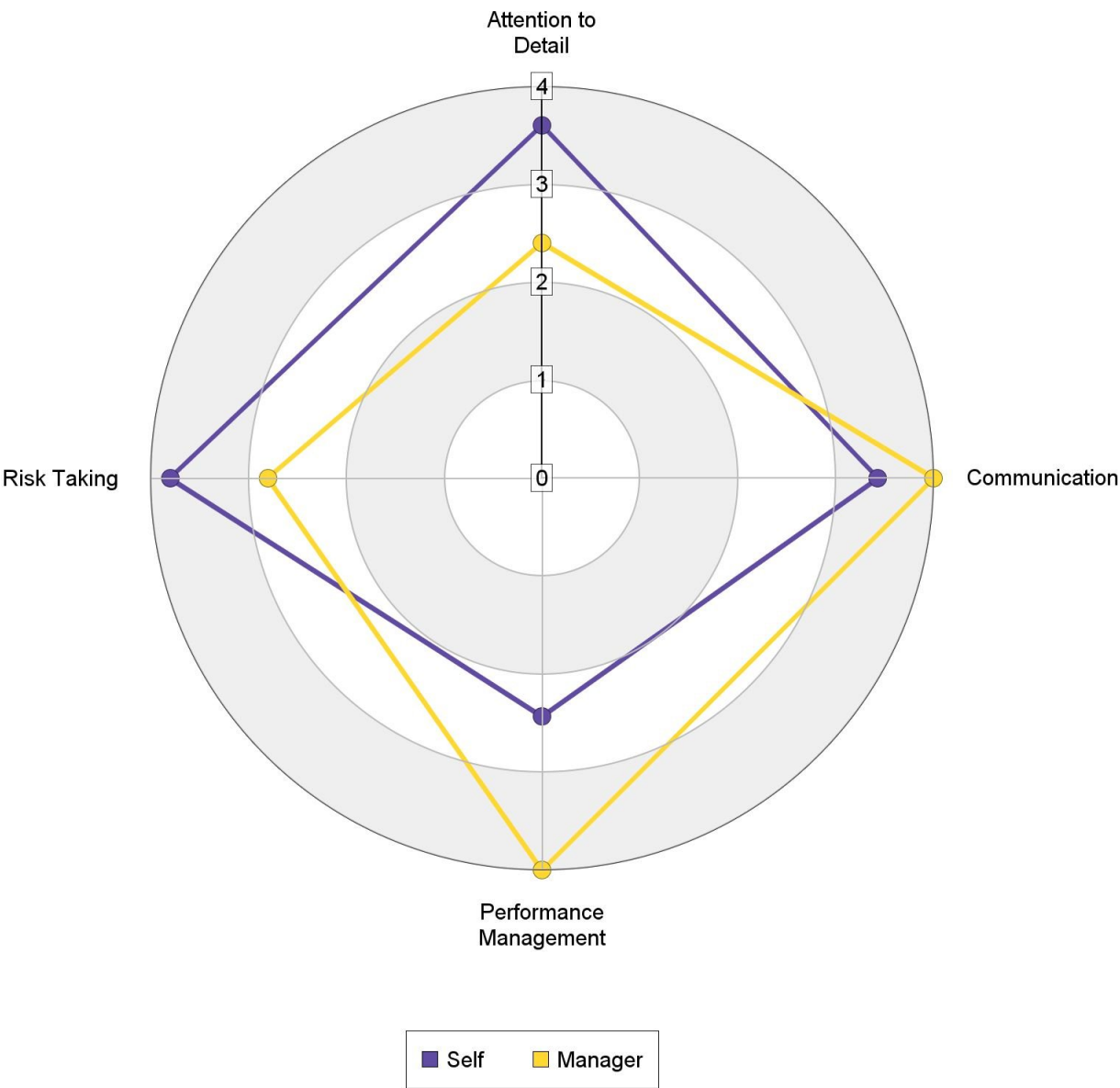
### Rating Scale Used

This review employed the following rating scale when asking reviewers to provide ratings of the subject's performance.

Scale Option	Assigned Value
Not Observed	---
Not Developed	1
Developing	2
Functional	3
Exemplary	4

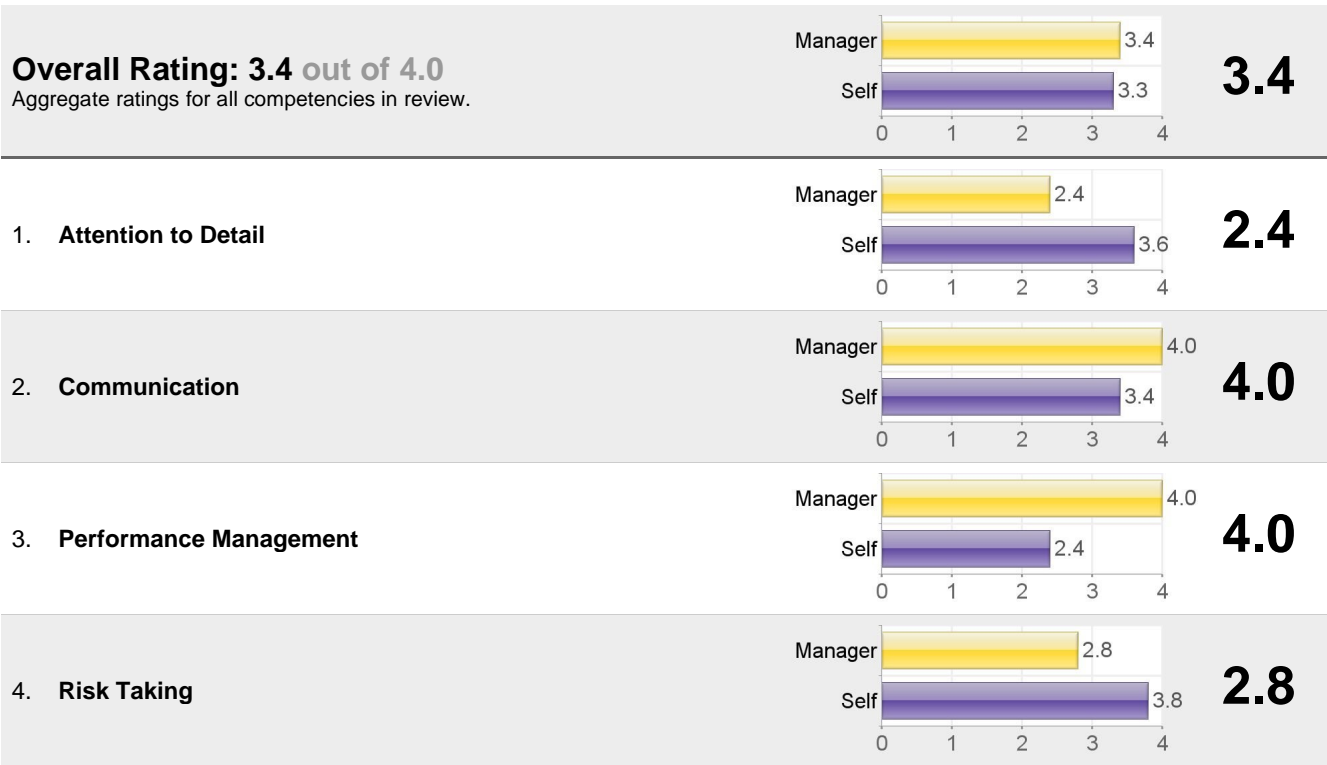
# Competency Profile

The Competency Profile radar chart below shows scores all competencies. Radar charts are useful in easily spotting gaps between respondents' perceptions and observations of an individual's behaviors. More favorable scores fall toward the outside of the chart.



# Competency Summary

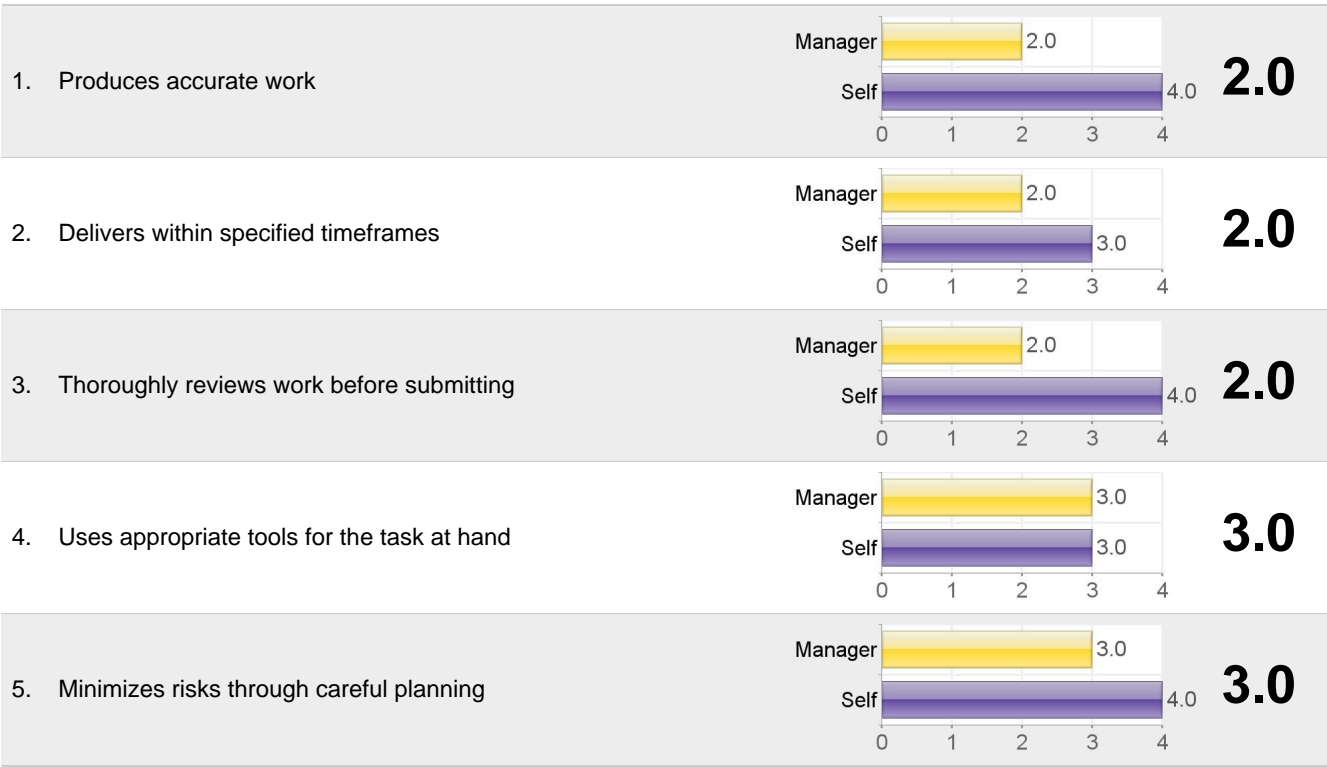
This report shows average ratings for each competency in the review.



# Individual Review Items

Scores for individual review items are below. Results are grouped by competency.

## Attention to Detail



Rating Scale: 4 = Exemplary; 3 = Functional; 2 = Developing; 1 = Not Developed; 0 = Not Observed

## Comments

**David Director wrote:**

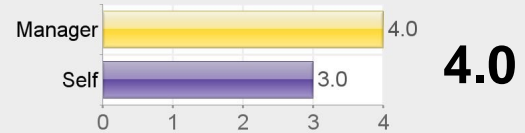
Sally is very detail oriented and her work is always polished.

**Sally Sales  
(self-rating) wrote:**

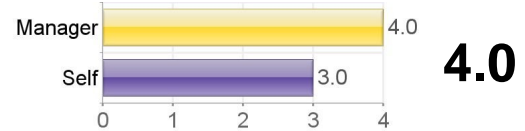
I feel that attention to detail is an area of great strength for me.

## Communication

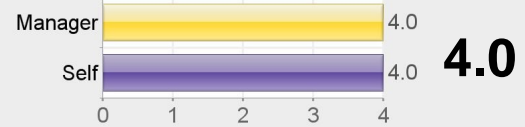
1. Tailors communication to the audience



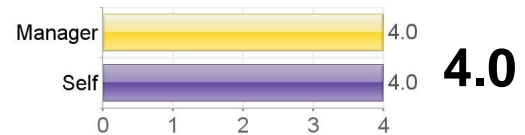
2. Delivers effective, high-quality presentations



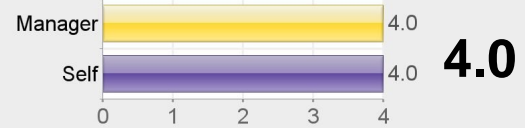
3. Shares an appropriate amount of information



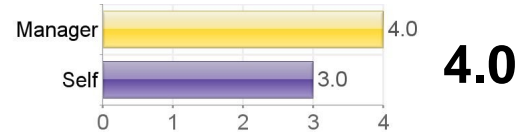
4. Is easy to understand



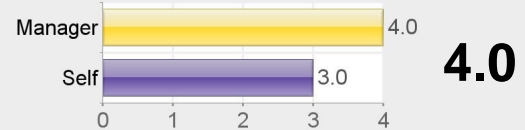
5. Uses humor appropriately



6. Encourages others to share their opinions



7. Handles criticism professionally



Rating Scale: 4 = Exemplary; 3 = Functional; 2 = Developing; 1 = Not Developed; 0 = Not Observed

## Comments

**David Director wrote:**

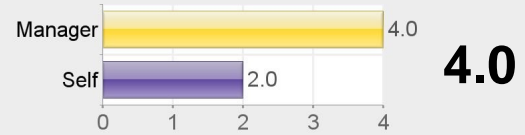
Sally clearly conveys information and ideas with conviction through a variety of media to individuals or groups in a manner that consistently engages their audience and helps them understand and retain the message.

**Sally Sales  
(self-rating) wrote:**

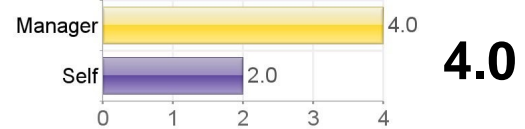
Communication is key. I make an effort to communicate clearly with my colleagues as well as clients.

## Performance Management

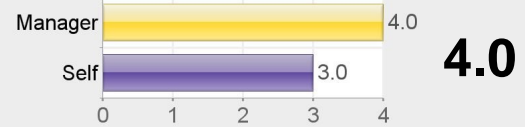
1. Provides clear, constructive feedback



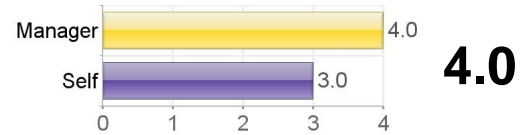
2. Sets measurable, achievable goals



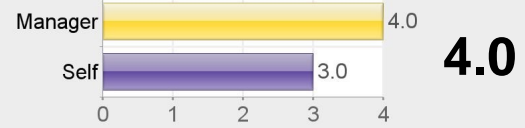
3. Encourages feedback from several sources



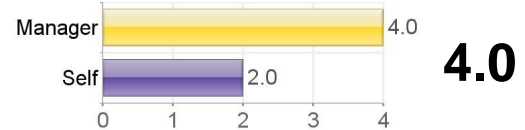
4. Conducts regular performance appraisals or reviews



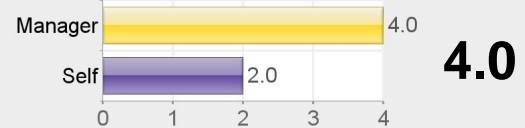
5. Links achievement and rewards



6. Maintains accurate records of performance



7. Crafts development plans for staff



Rating Scale: 4 = Exemplary; 3 = Functional; 2 = Developing; 1 = Not Developed; 0 = Not Observed

### Comments

**David Director wrote:**

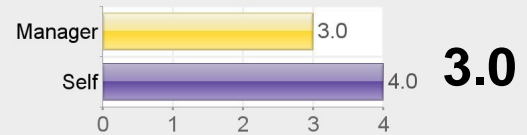
Sally consistently focuses and guides others in accomplishing work objectives. She collaborates with individuals to set meaningful performance objectives and sets specific goals to identify measures for evaluating goal achievement.

**Sally Sales  
(self-rating) wrote:**

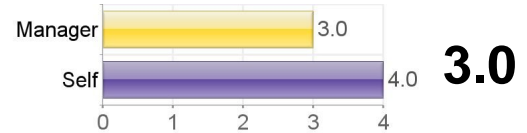
I have a hard time accepting developmental feedback. Accepting constructive criticism is a goal of mine for next year.

## Risk Taking

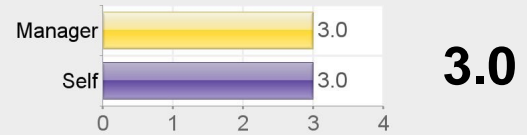
1. Tries new techniques to increase success



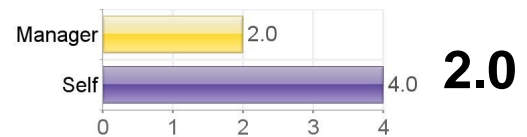
2. Understands balancing of risk and reward



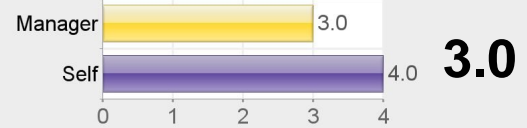
3. Takes into account all available information in making decisions



4. Consults others before taking risks



5. Is accountable for failures



Rating Scale: 4 = Exemplary; 3 = Functional; 2 = Developing; 1 = Not Developed; 0 = Not Observed

### Comments

**David Director wrote:**

Sally initiates action despite uncertainty of outcome and is willing to accept the consequences of failure.

**Sally Sales  
(self-rating) wrote:**

I won two accounts this year with risky proposals, so I would say I excel in this area!



## SALLY SALES

### Goals and Objectives for the Year Starting January, 2014

The table below shows your goals and objectives for the current year. Your organization's goal setting year begins on January 1st of each year. Goals that have been marked "closed" are not shown.

	Goal/Objective	Assigned	Due	Completion	Quality	Total Points
1.	Increase Sales 50% <i>Assigned by Director, D.</i>	12/23/2013	12/23/2014	70%	3.0 / 5.0	2.1 / 5.0
2.	Engage Sales Support <i>Assigned by Sales, S.</i>	1/10/2014	12/10/2014	45%	1.0 / 5.0	0.5 / 5.0
	<b>Total Goal Score</b>					<b>2.6 / 10.0</b>

## Recommended Reading

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The following articles are presented in partnership with the Harvard Business Review and other high-quality content sources. The articles below were dynamically identified as recommended reading to assist you in your professional growth and development. You can retrieve or purchase these articles by visiting <http://www.echospan.com/articles> and entering the article ID below the article's title.

### **The First 90 Days: Critical Success Strategies for New Leaders at All Levels**

*Michael D. Watkins*

Article ID: A20076

Fully a quarter of all managers in major corporations enter new leadership roles each year. Whether their assignments involve leading a work group or taking over a company as CEO, they face very similar challenges and risks in those critical first months on the job. How new leaders manage their transitions can make all the difference between success and failure. In this hands-on guide, Michael Watkins, a noted expert on leadership transitions, offers proven strategies for moving successfully into a new role at any point in one's career. Concise and practical, *The First 90 Days* walks managers through every aspect of the transition, from mental preparation to forging the right alliances to securing critical early wins. Through vivid examples of success and failure at all levels, Watkins identifies the most common pitfalls new leaders encounter and provides tools and strategies for how to avoid them.

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### **Retaining Your Best People: The Results-Driven Manager Series**

*Harvard Business School Press*

Article ID: A20079

If great talent is hard to find, it's even harder to keep. This valuable guide offers insights and strategies to make sure your most important people stay motivated, happy, and productive within your company. Engage your workers. Design appropriate incentive systems. Create an innovative culture. Managers are under increasing pressure to deliver better results, faster. Meeting today's tough challenges requires complete mastery of a full array of management skills, from communicating and coaching to public speaking and managing people. The Results-Driven Manager series is designed to help time-pressed managers hone and polish the skills they need most. Concise, action-oriented, and packed with invaluable strategies and tools, these timely guides help managers improve their job performance today and give them the edge they need to become the leaders of tomorrow.

Managers are under increasing pressure to deliver better results, faster. But meeting today's tough challenges requires complete mastery of a full array of management skills, from communicating and coaching to public speaking and managing people. The Results-Driven Manager series is designed to help time-pressed managers hone and polish the skills they need most. Concise, action-oriented, and packed with invaluable strategies and tools, these timely guides help managers improve their job performance today and give them the edge they need to become the leaders of tomorrow.

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### **Managing Change to Reduce Resistance: The Results-Driven Manager Series**

*Harvard Business School Press*

Article ID: A200710

Driving change is a difficult but necessary requirement for competing in today's marketplace. This guide shows how to get employees to embrace the need for change and work together to take advantage of new business realities by combating cynicism and gaining support, generating short-term wins, and overcoming major obstacles to change. Managers are under increasing pressure to deliver better results faster than the competition. Meeting today's tough challenges requires complete mastery of a full array of management skills, from communicating and coaching to public speaking and managing people. The Results-Driven Manager series helps time-pressed managers hone and polish the skills they need most. Concise, action-oriented, and packed with invaluable strategies and tools, these timely guides help managers improve their job performance today and give them the edge they need to become the leaders of tomorrow.

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### **Why Should Anyone Be Led by You? What It Takes to Be an Authentic Leader**

*Rob Goffee, Gareth Jones*

Article ID: A200713

Too many companies are managed not by leaders, but by mere role players and faceless bureaucrats. What does it take to be a real leaderone who is confident in who she is and what she stands for and who truly inspires people to achieve extraordinary results? Rob Goffee and Gareth Jones argue that leaders dont become great by aspiring to a list of universal character traits. Rather, effective leaders are authentic: They deploy individual strengths to engage followers hearts, minds, and souls. They are skillful at consistently being themselves, even as they alter their behaviors to respond effectively in changing contexts. In this lively and practical book, Goffee and Jones draw from extensive research to reveal how to hone and deploy ones unique leadership assets while managing the inherent tensions at the heart of successful leadership: showing emotion and withholding it, getting close to followers while keeping distance, and maintaining individuality while conforming enough. Underscoring the social nature of leadership, the book also explores how leaders can remain attuned to the needs and expectations of followers. *Why Should Anyone Be Led by You?* changes forever how we view, develop, and practice the art of leadership, wherever we live and work.

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### **Who Has the D? Enhancing Organizational Performance Through Better Decision Making**

*Paul Rogers*

Article ID: A200714

Every success, every mishap, every opportunity seized or missed at your organization is the result of a decision that someone made or failed to make. No matter what industry youre in, how big and well known your company may be, or how clever your strategy, if you cant make the right decisions quickly and effectively, and execute those decisions consistently, your business will lose ground. Recent research and best practice evidence have shown that superior quality, speed, and execution of decision making can help you outperform your competitors. In this interactive, 90-minute presentation, Paul Rogers of Bain & Co. addresses four common bottlenecks that disrupt decision making and provide a primer on a framework for busting through them. Among the areas he explores are: How to clarify decision-making rights and rolesand assign responsibilities; how to balance global vs. local, center vs. business unit, function vs. function, and inside vs. outside partner agendas and priorities; and how to unstick decisions that routinely get bogged down in your organization. Making good decisions and making them happen quickly are hallmarks of high-performing organizations. The insights from this virtual seminar will get your team started on the right track.

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### **Managing Authenticity**

*by Rob Goffee and Gareth Jones*

Article ID: A200716

Leaders and followers both associate authenticity with sincerity, honesty, and integrity. It's the real thing—the attribute that uniquely defines great managers. But while the expression of a genuine self is necessary for great leadership, the concept of authenticity is often misunderstood, not least by leaders themselves. They often assume that authenticity is an innate quality—that a person is either genuine or not. In fact, the authors say, authenticity is largely defined by what other people see in you and, as such, can to a great extent be controlled by you.

In this article, the authors explore the qualities of authentic leadership. To illustrate their points, they recount the experiences of some of the authentic leaders they have known and studied, including the BBC's Greg Dyke, Nestlé's Peter Brabeck-Letmathe, and Marks & Spencer's Jean Tomlin.

Establishing your authenticity as a leader is a two-part challenge. You have to consistently match your words and deeds; otherwise, followers will never accept you as authentic. But it is not enough just to practice what you preach. To get people to follow you, you also have to get them to relate to you. This means presenting different faces to different audiences—a requirement that many people find hard to square with authenticity. But authenticity is not the product of manipulation. It accurately reflects aspects of the leader's inner self, so it can't be an act.

Authentic leaders seem to know which personality traits they should reveal to whom, and when. Highly attuned to their environments, authentic leaders rely on an intuition born of formative, sometimes harsh experiences to understand the expectations and concerns of the people they seek to influence. They retain their distinctiveness as individuals, yet they know how to win acceptance in strong corporate and social cultures and how to use elements of those cultures as a basis for radical change.

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Company leader. The best sales chiefs actively help formulate and execute company strategy, and they collaborate with all functions of the business to deliver value to customers.

Customer champion. Customers want C-level relationships with suppliers in order to understand product strategy, look at offerings in advance, and participate in decisions made about future products—and sales leaders are in the best position to offer that kind of contact.

Process guru. Although sales chiefs must look beyond the sales and customer processes they have honed over the past decade, they can't abandon them. The focus on process has become only more important as many organizations have begun bundling products and services to meet important customers' individual needs.

Organization architect. Good sales leaders spend a lot of time evaluating and occasionally redesigning the sales organization's structure to ensure that it supports corporate strategy. Often, this involves finding the right balance between specialized and generalized sales roles.

Course corrector. Sales leaders must watch the horizon, but they can't take their hands off the levers or forget about the dials. If they do, they might fail to respond when quick adjustments in priorities are needed.

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### **Managing Yourself**

*Peter F. Drucker*

Article ID: A200718

Throughout history, people had little need to manage their careers—they were born into their stations in life or, in the recent past, relied on their companies to chart their career paths. But times have drastically changed. Today we must all learn to manage ourselves. What does that mean? As Peter Drucker tells us in this seminal article first published in 1999, it means we have to learn to develop ourselves. We have to place ourselves where we can make the greatest contribution to our organizations and communities. And we have to stay mentally alert and engaged during a 50-year working life, which means knowing how and when to change the work we do. It may seem obvious that people achieve results by doing what they are good at and by working in ways that fit their abilities. But, Drucker says, very few people actually knowlet alone take advantage of their fundamental strengths. He challenges each of us to ask ourselves: What are my strengths? How do I perform? What are my values? Where do I belong? What should my contribution be? Don't try to change yourself, Drucker cautions. Instead, concentrate on improving the skills you have and accepting assignments that are tailored to your individual way of working. If you do that, you can transform yourself from an ordinary worker into an outstanding performer. Today's successful careers are not planned out in advance. They develop when people are prepared for opportunities because they have asked themselves those questions and rigorously assessed their unique characteristics. This article challenges readers to take responsibility for managing their futures, both in and out of the office.

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### **The Hidden Traps in Decision Making**

*John S. Hammond, Ralph L. Keeney, Howard Raiffa*

Article ID: A200724

Bad decisions can often be traced back to the way the decisions were made—the alternatives were not clearly defined, the right information was not collected, the costs and benefits were not accurately weighed. But sometimes the fault lies not in the decision-making process but rather in the mind of the decision maker: The way the human brain works can sabotage the choices we make. In this article, first published in 1998, John S. Hammond, Ralph L. Keeney, and Howard Raiffa examine eight psychological traps that can affect the way we make business decisions. The anchoring trap leads us to give disproportionate weight to the first information we receive. The status-quo trap biases us toward maintaining the current situation even when better alternatives exist. The sunk-cost trap inclines us to perpetuate the mistakes of the past. The confirming-evidence trap leads us to seek out information supporting an existing predilection and to discount opposing information. The framing trap occurs when we misstate a problem,

undermining the entire decision-making process. The overconfidence trap makes us overestimate the accuracy of our forecasts. The prudence trap leads us to be overcautious when we make estimates about uncertain events. And the recallability trap prompts us to give undue weight to recent, dramatic events. The best way to avoid all the traps is awareness: forewarned is forearmed. But executives can also take other simple steps to protect themselves and their organizations from these mental lapses to ensure that their important business decisions are sound and reliable.

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### **The Making of a Corporate Athlete**

*Jim Loehr, Tony Schwartz*

Article ID: A200726

Management theorists have long sought to identify precisely what makes some people flourish under pressure and others fold. But they have come up with only partial answers: rich material rewards, the right culture, management by objectives. The problem with most approaches is that they deal with people only from the neck up, connecting high performance primarily with cognitive capacity. Authors Loehr and Schwartz argue that a successful approach to sustained high performance must consider the person as a whole. Executives are, in effect, corporate athletes. If they are to perform at high levels over the long haul, they must train in the systematic, multilevel way that athletes do. Rooted in two decades of work with world-class athletes, the integrated theory of performance management addresses the body, the emotions, the mind, and the spirit through a model the authors call the performance pyramid. At its foundation is physical well-being. Above that rest emotional health, then mental acuity, and, finally, a spiritual purpose. Each level profoundly influences the others, and all must be addressed together to avoid compromising performance. Rigorous exercise, for instance, can produce a sense of emotional well-being, clearing the way for peak mental performance. Rituals that promote oscillationthe rhythmic expenditure and recovery of energylink the levels of the pyramid and lead to the ideal performance state. The authors offer case studies of executives who have used the model to increase professional performance and improve the quality of their lives.

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### **Your Companys Secret Change Agents**

*Richard Tanner Pascale, Jerry Sternin*

Article ID: A200734

Organizational change has traditionally come about through top-down initiatives such as hiring experts or importing best-of-breed practices. Such methods usually result in companywide rollouts of templates that do little to get people excited. But within every organization, there are a few individuals who find unique ways to look at problems that seem impossible to solve. Although these change agents start out with the same tools and access to resources as their peers, they are able to see solutions where others do not. These positive deviants are the key, the authors believe, to a better way of creating organizational change. Your company can make the most of their methods by following six steps: Make the group the guruthemembers of the community are engaged in the process of their own evolution. Reframe through facts, which entails restating the problem in a way that opens minds to new possibilities. Make it safe to learn, creating an environment that supports innovative ideas. Make the problem concrete; the community combats abstraction by stating uncomfortable truths. Leverage social proof; here the community looks to the larger society for examples of solutions that have worked in parallel situations. Finally, confound the immune defense response; solutions are introduced organically from within the group in a way that promotes acceptance. Throughout the steps, the leader must adopt a facilitatory role. The positive-deviance approach has unearthed solutions to such complicated and diverse problems as malnutrition in Mali and human trafficking in East Java. This methodology can help solve even the most extreme dilemmas.

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### **Managers with Impact: Versatile and Inconsistent**

*C. Wickham Skinner, W. Earl Sasser Jr.*

Article ID: A200737

An analysis of the activities of key managers in 31 case studies suggests that managers who consistently accomplish a lot are notably inconsistent in their manner of attacking problems. These high achievers persist, however, in careful situational analysis and self-discipline, which permits them to be inconsistent in personal and managerial style. They consider operating skills and strategies flexible and adjust these to changing circumstances. They recognize classical patterns of problems and solutions and are able to choose discriminatingly among the wide variety of action-techniques available.

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## Employee Acknowledgement

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My signature below acknowledges that I have discussed this performance review with my supervisor and/or manager. I also acknowledge that I have been given the opportunity to provide feedback and provide input by completing a self-evaluation.

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**Employee Signature / Date**

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**Manager Signature / Date**