

MANAGING COMPENSATION, PERFORMANCE & CAREER PATHS



STEPHANIE
BOGAN

YOU CAN'T MANAGE WHAT YOU CAN'T MEASURE



COMPENSATION



PERFORMANCE



CAREER GROWTH

How to **MANAGE** Your Team

❑ Overcome Mindset Blocks



❑ Receive Leadership & Management Training



❑ Set Clear Roles



❑ Build Compelling Culture



❑ Set growth strategy and clear goals



How to **REWARD** Your Team

❑ Define Compensation



❑ Include Perks & Benefits



How to **GROW** Your Team

❑ Allow for Professional Development



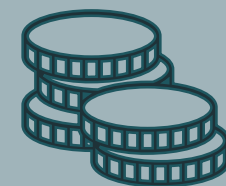
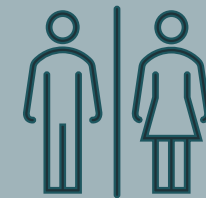
❑ Create Career Paths



❑ Check in Regularly



MINDSET





MANAGING PEOPLE IS A BUSINESS SYSTEM

Sample Administrative Assistant Job Description

The below is a sample of an administrative assistant job description. Customize this to align with the role in your firm. Review and update roles every one to two years.

Job Title: Administrative Assistant **Status:** Hourly, Nonexempt
Revision Date: 7/1/2020 **Reports To:** Business Manager

Impact, Purpose & Outcome
 The Administrative Assistant is a servant-leader who supports the firm's overall operational efficiency as well as the client experience. Using strong communication skills and a professional demeanor, the position supports other team members and the office as a whole by providing exceptional service both internally and externally. This position is the positivity advocate within the firm. Success in the role results in the following outcomes:

- Administrative and operational tasks are completed in a proactive, efficient, accurate and timely manner – the little things don't fall through the cracks.
- The capacities of the CEO and team members are improved because of the administrative items they are able to delegate successfully.
- Inefficiencies in the office are identified, and recommendations for improvement are shared with leadership.
- The team, clients and visitors feel welcome and have positive first impressions when they enter or communicate with our office.
- Faxes, technology needs, and client meetings and travel arrangements are proactively addressed and well-coordinated.

Key Responsibilities
 The Administrative Assistant thrives in a fast-paced environment and maintains a positive and poised attitude at all times. This individual consistently applies good judgment, critical thinking and problem-solving skills in order to juggle multiple schedules, projects and priorities while paying attention to details. Effective communication is key, as is being a team player to support the administrative needs of our team.

Administrative-Support Duties

- Serves as first point of contact for the firm, both in person and virtually, and always demonstrates a positive and upbeat attitude.
- Provides exceptional administrative support to our CEO and completes special projects as requested.

Job Description Samples

Value of your 2020 total rewards package:

EARNINGS	Current Annual Income	\$50,000.00
	2020 Bonus	\$2,096.88
	Your total earnings	\$52,096.88
BENEFITS	Insurance	
	Medical	\$5,081.58
	Dental	N/A
	Vision	N/A
	Life Insurance	\$123.00
	Short/Long-Term Disability	\$321.48
	Salary Benefits	
	Social Security/Medicare	\$3,695.38
	Retirement	
	401k estimated match	\$1,999.92
	2019 Profit Sharing Contribution	\$4,387.31
	Other Company Provided Benefits	Provided for you
	Employee Assistance Program (EAP)	\$620.00
	Cell Phone Reimbursement	\$1,000.00
	Health & Wellness Reimbursement	\$70,725.55
	Your total benefits	\$3,846.15
TIME OFF	Paid Time Off/Sick Leave	\$1,923.08
	Holidays	
	TOTAL COMPENSATION BREAKDOWN	
	YOUR 2020 TOTAL COMPENSATION PACKAGE VALUE:	\$75,094.78

Compensation Plan Sample Tanya Nichols

Performance Review Form

(Your logo here)

Team Member: _____ **Hire Date:** _____
Reviewed by: _____ **Today's Date:** _____

I, YOU MAKE A DIFFERENCE!
EVALUATION OF SELF PERFORMANCE

Please complete the following evaluation of yourself as you view a manager of this firm. Be honest and thorough! Your answers will be reviewed alongside your team leader's actual responses during your Review Meeting. We hope this activity will allow you a time of self-reflection, while also enabling us to have an active discussion regarding your role and contribution.

****OVERALL RATING WILL BE COMPLETED DURING YOUR REVIEW MEETING****

1 - Unsatisfactory - Unacceptable performance suggesting a lack of willingness and/or ability to perform the requirements of the position, especially performance.

2 - Marginal - Performs many duties in a capable manner; meets some goals and objectives, but requires improvement to achieve overall acceptable performance.

3 - Acceptable - Consistently performs most duties of the position in a capable manner; meets expected criteria for quality, quantity, timeliness and meeting goals and objectives.

4 - Above Expectation - Consistently exceeds the expected criteria for the position, quality, quantity and timeliness; consistently exceeds goals and objectives.

5 - Exceptional - Consistently far exceeds all expectations; always achieves exceptional results well beyond those expected.

Area	PROFESSIONAL	Team Member	Team Leader
Expertise	Exhibits a mastery of knowledge, and an effort to continue educational, technical, and applicable growth in area of assigned operation.	1 2 3 4 5	1 2 3 4 5
Reliability	Is efficient and decisive when working autonomously, and exhibits adequate time management and follow-through skills. Presents for meetings on time and prepared.	1 2 3 4 5	1 2 3 4 5
Team Minded	Exhibits a desire to collaborate with peers, team & supervisors to promote team focus, growth, communication & effectiveness.	1 2 3 4 5	1 2 3 4 5
Task Efficiency & Timeliness	Is effective in planning, organizing and efficiently handling tasks. Meets deadlines accurately and with complete work, showing appropriate attention to detail.	1 2 3 4 5	1 2 3 4 5
Professional Demeanor	Maintains a high level of professionalism when dealing with clients, fellow team members and outside vendors.	1 2 3 4 5	1 2 3 4 5
Software	Exhibits adequate knowledge and understanding of relevant software and computer programs; meets standard of use.	1 2 3 4 5	1 2 3 4 5
Firm Function	Shows adequate understanding of firm's mission statement, including overall function and responsibilities to it's clients, firm philosophy and service lines.	1 2 3 4 5	1 2 3 4 5
Firm Policies	Exhibits an awareness of and adherence to firm policies, procedures and expectations.	1 2 3 4 5	1 2 3 4 5
Area	COMMUNICATION	Team Member	Team Leader
Communication Dynamics	Able to effectively communicate in both one-on-one and group environments, engages and respects other's input.	1 2 3 4 5	1 2 3 4 5
Listening & Expressing	Effective in obtaining understanding from others, and conveying meaning of ideas both orally and in writing.	1 2 3 4 5	1 2 3 4 5
Presentation Skills	Presentations regularly prepared and reviewed; messages are clear and concise on a personal level. Communications effectively with voice, project and equipment.	1 2 3 4 5	1 2 3 4 5

Performance Review Form

Team Check-In Form

The following pages include a sample and template quarterly check-in form for you to use in your professional development process.

NAME: _____ **DATE:** _____

INTEGRITY **INITIATIVE** **TEAM WORK** **COMMITMENT** **QUALITY**

Exceeded at: 0-2 examples of above aligning with values
 Room for improvement: 3-4 examples of above work could more closely align with values

Key Successes:
 List 3-4 specific examples of key successes, contributions or accomplishments the team member made since the last check-in.

Review of Last Quarter Goals:
 List 3-4 previous goals, projects or priorities you achieved after last quarter check-in or what the status update is regarding goal?

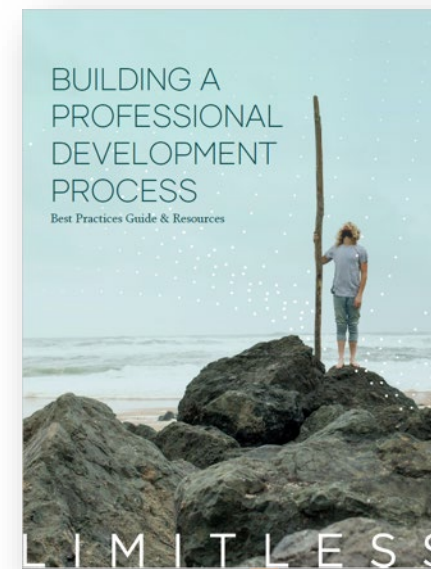
Upcoming Goals:
 List 3-4 previous goals, projects or priorities you would like to set for the team member. The number depends on the time between check-ins and the nature of the goals (1-2 to typically a good objective, an ideal since it gives someone positive feedback on the goal and it would likely to get done).

Team Check-In Form

DESTINY CAPITAL MARKETING POSITION

COORDINATOR	MANAGER
Investment News: \$47,000	Investment News: \$61,750
Banking Salary Avg: \$45,000-\$48,000	Finance & Banking Salary Avg: \$52,000
Salary Range: \$42,000 - \$60,000 all in	Broad Salary Range: \$40,000-\$80,000
	More Agency
Writing content for materials	Must display an understanding of our brand and
Manages day to day marketing tasks and projects and activities as requested	Managing all marketing for the company and act marketing
Development of branded items such as client materials, e-mailers, etc.	Developing the marketing strategy for the company and company objectives
Coordinating and collating content	Co-ordinating marketing campaigns with sales and
Managing marketing communications, such as flyers, brochures, on-related projects	Overseeing the company's marketing budget

Career Pathing Sample Destiny Capital



Professional Development

DEFINE THE ROLE



KEY RESPONSIBILITIES



DESIRED OUTCOMES



STATUS, LOCATION AND HOURS



EXPERIENCE AND QUALIFICATIONS

Sample Financial Advisor Job Description

The below is a sample of a Financial Advisor job description. This sample includes some business development responsibilities that may be included or removed based on your firm requirements.

JOB TITLE: Financial Advisor Level II STATUS: Exempt
REVISION DATE: 7/7/2020 REPORTS TO: CEO

Impact, Purpose & Outcomes
The Financial Advisor's main goal is to deliver simple, personal, and straight-forward solutions to help clients achieve their goals. In doing so, they will create fulfilled and engaged clients that have gained clarity, confidence and peace of mind. This role will also support the growth and development of the business and team. Success in these areas will result in:

- Authentic, long-lasting relationships with clients
- Educated and informed clients who feel confidence and peace of mind
- Financial planning advice / recommendations and investment performance that meets firm standards and keeps clients on track to achieve their goals
- A high-achieving support team that is satisfied with their leader
- Client retention of 90% or better
- Manage and oversee 5X in managed revenue / X client relationships
- New clients and business generation of 5K
- Consistent client referrals (X per year)

Key Responsibilities
The financial advisor recognizes that our most important asset is our clients, and craft thoughtful strategies to help each individual achieve their financial goals. They use a comprehensive understanding of financial planning and the markets to help existing clients while cultivating referrals and prospective clients.

- Own full cycle of client relationships from initial outreach to onboarding to ongoing review

Sample Client Service Associate Job Description

The below is a sample of a senior financial advisor job description. Customize this to align with the role in your firm. Review and update roles every one to two years.

JOB TITLE: Client Service Associate STATUS: Exempt
REVISION DATE: 7/7/2020 REPORTS TO: Business Manager

Impact, Purpose & Outcome
The purpose of this role is to create satisfying experiences for clients, making them feel like they are our only client. This role sets the tone for the firm's relationships with clients and is integral to the delivery of an amazing client experience. Without the operations support of the position, clients wouldn't achieve their goals. Success in this role will result in:

- Authentic, long-lasting relationships with clients
- Clients who rave about the level of support they receive
- Consistent, accurate and timely execution of client service and operations
- Less than X client complaints regarding errors / paper
- Client retention of 90% or better
- Consistent client referrals (X per year)

Key Responsibilities
The Client Service Associate implements routine client preparing reports and other documentation on client schedules and prepares for meetings between clients and advisors.

- Builds and maintains client relationships by providing and ensuring that client expectations are exceeded
- Field client phone calls and correspondence
- Onboard new clients

Sample Associate Financial Advisor Job Description

The below is a sample of an associate financial advisor job description, which typically has limited business development responsibilities. Review and update roles every one to two years.

JOB TITLE: Associate Financial Advisor Level II STATUS: Exempt
REVISION DATE: 7/7/2020 REPORTS TO: Senior Advisor

Impact, Purpose & Outcomes
The Associate Advisor's top priority is supporting advisors, along with planning and investment processes, to ultimately ensure clients achieve the results they are looking for and to help clients achieve their goals. The next priority is to advance the role and learn the complexities of becoming a fully independent advisor. Success in these areas will result in:

- Authentic, long-lasting relationships with clients
- Educated and informed clients who feel confidence and peace of mind
- Consistent, accurate and timely execution of client services, management and plan
- Client retention of 90% or better
- Manage up to 5X in house accounts / X client relationships
- Consistent client referrals (X per year)
- Expansion of financial planning and investment expertise

Key Responsibilities
The Associate Advisor position contributes to the firm's growth by providing support to advisors and preparing. This role serves as a relationship manager for house accounts and provides support for both existing clients and prospective. This role serves as a relationship manager for house accounts and provides support for both existing clients and prospective. This role serves as a relationship manager for house accounts and provides support for both existing clients and prospective.

Sample Business Manager Job Description

The below is a sample Business Manager job description. In larger firms, this is a dedicated management position. In smaller firms, it is typically a hybrid role office manager and senior client service role. Customize this to align with the role in your firm. Review and update roles every one to two years.

JOB TITLE: Business Manager STATUS: Exempt
REVISION DATE: 7/7/2020 REPORTS TO: CEO

Impact, Purpose & Outcomes
The purpose of this role is to be a leader of the firm to deliver impeccable client service and create an environment that fosters team work, positive attitudes, and support of the firm values and mission. The implementation of business systems creates a sustainable and profitable environment that makes the roles of each team member easier and more enjoyable. Success in this role will result in:

- A strong and positive team culture with happy, high performers that demonstrate professional development
- Improved CEO capacity because of the ability to successfully delegate day-to-day business management
- Clients who rave about the level of support they receive
- Consistent, accurate and timely execution of client service and operations items
- A high-achieving support team that is satisfied with their leader
- Personnel issues and conflicts addressed and resolved efficiently in a professional manner
- Client retention of 90% or better
- Less than X client complaints regarding errors / paperwork processing per year
- Consistent client referrals (X per year)

Key Responsibilities
The Business Manager maintains primary responsibility for overseeing all administrative functions and ensuring smooth and efficient operation of the firm including administration, office operations, human resources, finance, technology and marketing. This role works to develop and maintain effective, sustainable and profitable business operations for the firm, as well as works closely with management to direct, manage and oversee business strategy and firm-level projects that impact firm success, team performance and client experience.

Business Operations & Administration

- Design, implement and oversee key business systems, standards and rules for business operations
- Fulfill and provide back-up support for client service and operations responsibilities as needed
- Delegates lower-level responsibilities to team to avoid bottleneck
- Act as relationship manager for strategic alliances and vendors to coordinate relevant business initiatives

Sample Administrative Assistant Job Description

The below is a sample of an administrative assistant job description. Customize this to align with the role in your firm. Review and update roles every one to two years.

JOB TITLE: Administrative Assistant STATUS: Hourly/Nonexempt
REVISION DATE: 7/7/2020 REPORTS TO: Business Manager

Impact, Purpose & Outcomes
The Administrative Assistant is a servant-leader who supports the firm's overall operations as well as the client experience. Using strong organizational skills, the position supports other roles by providing exceptional service both internally and externally. Success in this role will result in:

- Operational tasks are completed in a proactive, timely manner – the little things that don't fall through the cracks
- CEO and team members are improved because of the Administrative Assistant's ability to identify and recommend solutions for client needs
- Client and team members have positive first impressions and have positive first impressions and have positive first impressions
- Client and team members have positive first impressions and have positive first impressions



DEFINING YOUR COMPENSATION MODEL



Compensation Philosophy



Position Compensation

- Industry Benchmarks
- Market Conditions
- Financial Resources



Include all forms of compensation

- Work location (remote is a perk)
- Flexible hours / work schedule
- Cash compensation
- Holiday time
- Bonuses
- Non-cash perks



COMPONENTS OF COMPENSATION

BASE

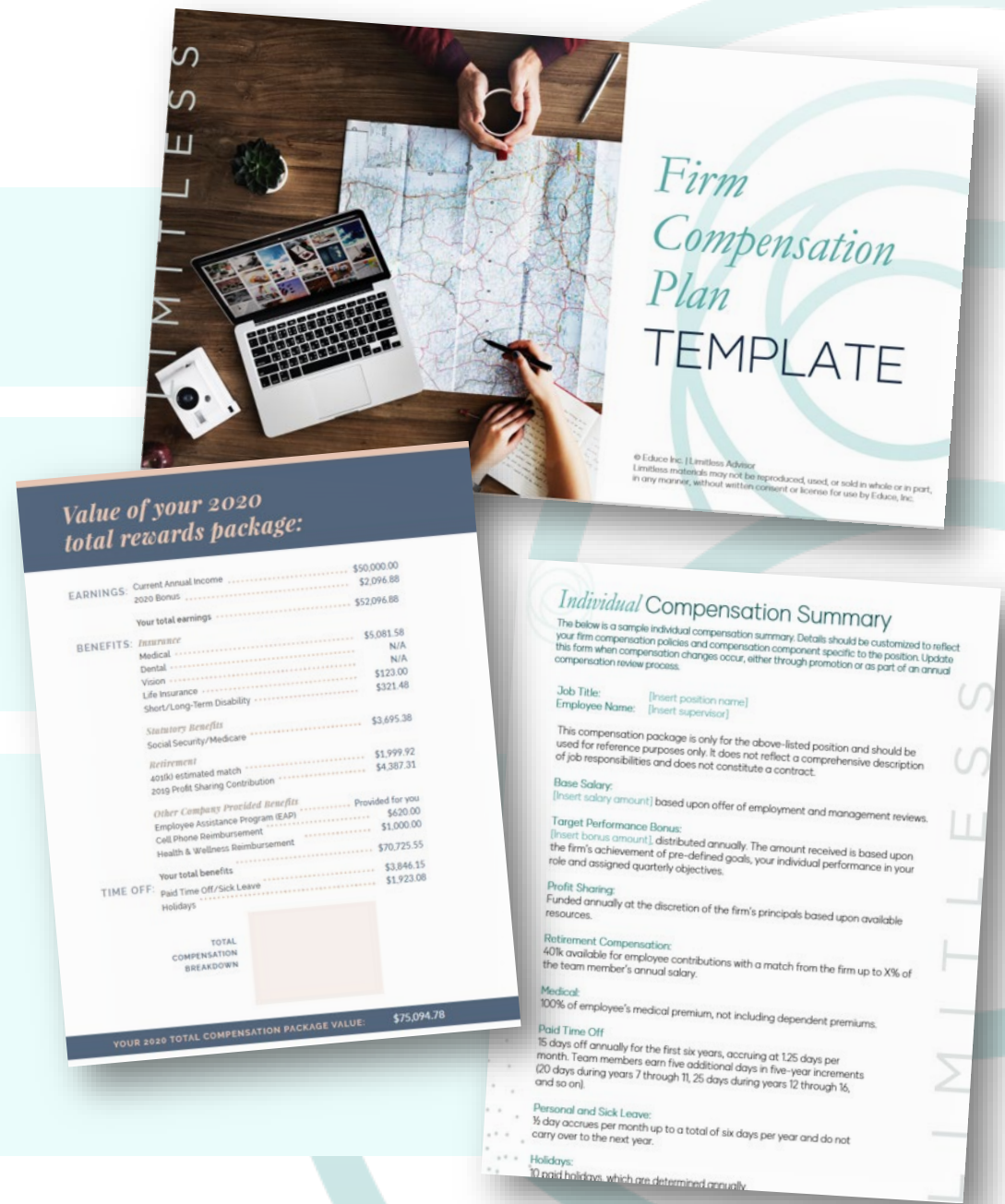
SET BY CAREER LADDER

BONUS

INDIVIDUAL PERFORMANCE
TEAM PERFORMANCE (AS APPLICABLE)
FIRM PERFORMANCE

BENEFITS

HEALTH CARE
HEALTH & WELL-BEING
CATERED MEALS
CONTINUING ED ALLOWANCE
Insert more here...



COMPENSATION

and other forms of motivation and reward



TAKE A HOLISTIC VIEW AND APPROACH



Remember...
if you pay
peanuts, you'll
get monkeys.

MONETARY COMPENSATION & BENEFITS



PERKS & BENEFITS

There Is More To Compensation Than Money



INDUSTRY COMP

POSITION TITLE	ONLINE SALARY SITES	2021 INVESTMENT NEWS STUDY MEDIAN TOTAL TRAD. COMP
Chief Marketing Officer	\$250K	\$268K
Lead Advisor	\$208K	\$213K
Associate/Service Advisor	\$120K	\$98K
Chief Operating Officer	\$125K	\$277K
Operations Manager	\$75K	\$94K
Marketing Manager	\$60K	\$73K
Paraplanner*	\$50K	\$56K*
Client Service Asst.	\$50K	\$55K
Operations Assistant	\$40K	\$48K
Marketing Assistant	\$35K	\$ -

*alternate data source

COMPENSATING TEAMS

CATEGORIES	Individual Performance	Team + Firm Performance	Combined Firm & Team Performance
EXAMPLE POSITION	Administrative / Executive Assistant	Client Service Associate	Operations Manager
BASE	\$40K - \$50K	\$50K - \$60K	\$70K - \$100K
BONUS	10% OF BASE	10% OF BASE	20% OF BASE PROFIT SHARING
ABOVE & BEYOND	On Spot Bonuses, Team Recognition, Little Things		
BENEFITS & PERKS	2-3 weeks, plus holidays	3-4 weeks, plus holidays	Unlimited PTO
	Health Care / Health Savings 401k, Education Support		

The above are examples to show varying compensation models, actual data is based on industry ranges and consulting experience. Your compensation plan should be designed to align with your compensation philosophies, ensure competitive pay for your location/market conditions.


COMPENSATING ADVISORS

RULE OF THUMB
 40% OF TOTAL REVENUE
 TO ADVISOR COMP
 [REVENUE GOAL = MIN 2.5x BASE SALARY]

BONUS STRATEGIES

[40%] of Revenue Managed	Base + % of Revenue Managed		Base + % of Team Revenue Managed	Base + Bonus
\$500,00 REVENUE $\times 40\%$ \$200,000 comp.	\$500,000	REVENUE	\$1,000,000 REVENUE	\$300,000 REVENUE
	TTL Possible: (Level 1, 25%)	\$125,000	Base: \$70K – \$200K BASED ON ADVISOR LEVEL	Base: \$70K – \$200K BASED ON ADVISOR LEVEL
	Base Salary:	\$105,000	Bonus: % of Team Revenue	Bonus: 10% of base Firm: up to 10% base
	Bonus:	up to 25% of TRM*		

*Total revenue managed



A team of
happy, high
performers
is built on a
culture of...

ALIGNMENT: Shared vision and goals, contribution ties to rewards

INVESTMENT: Involvement equals investment, letting go lets others lead

COMMUNICATION: No mind-reading allowed

COLLABORATION: Get there better together than we can on our own

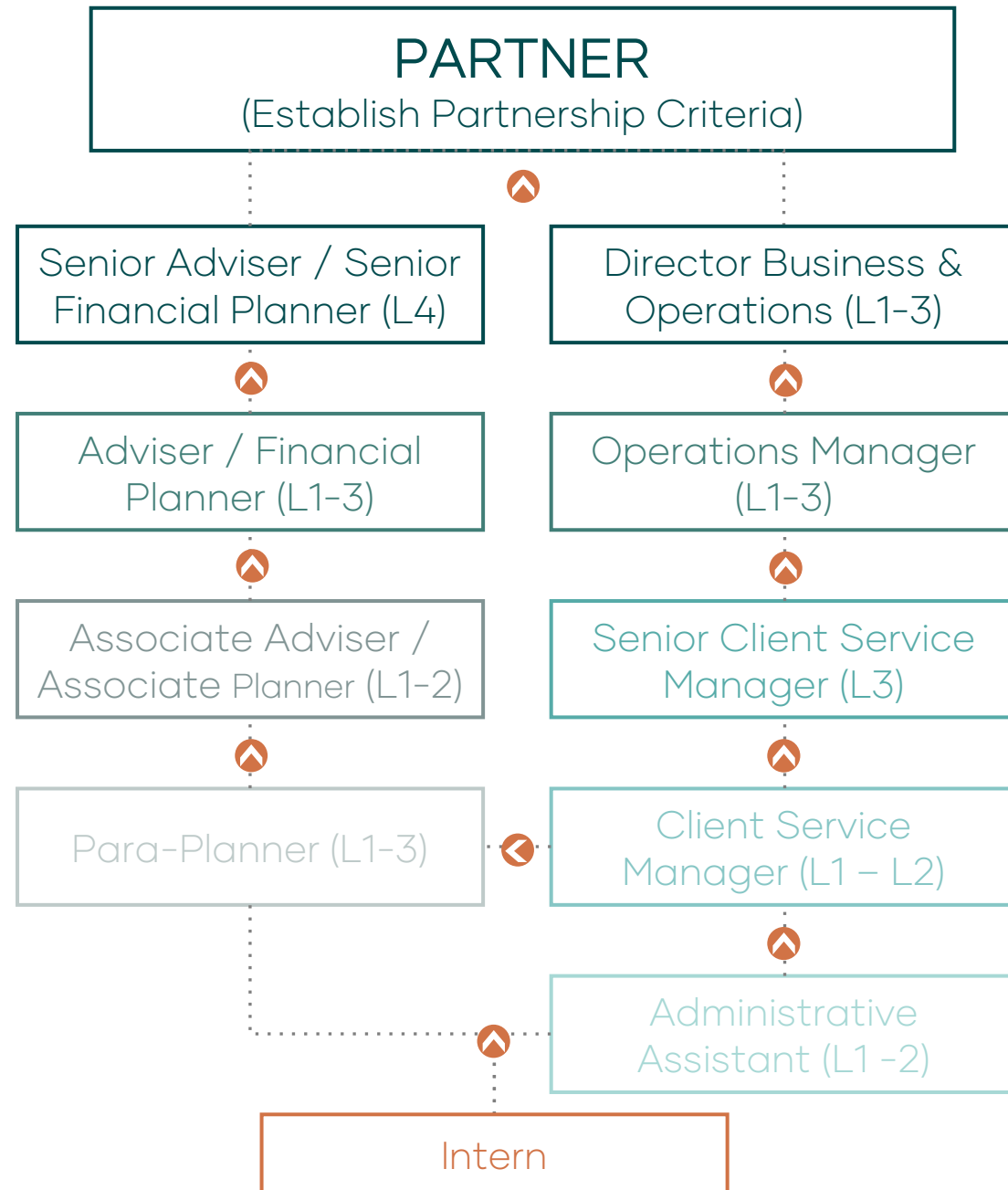
ACCOUNTABILITY: Extreme ownership creates radical results

IMPROVEMENT: Continuous improvement

PROGRESS: Purpose and progress are proxies for perfection

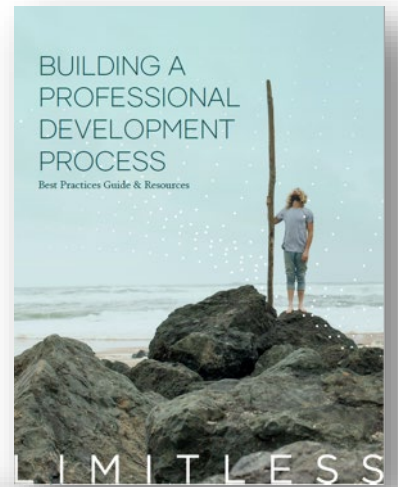
CAREER LADDERS

CREATING A CLEAR PATHWAY TO GROWTH



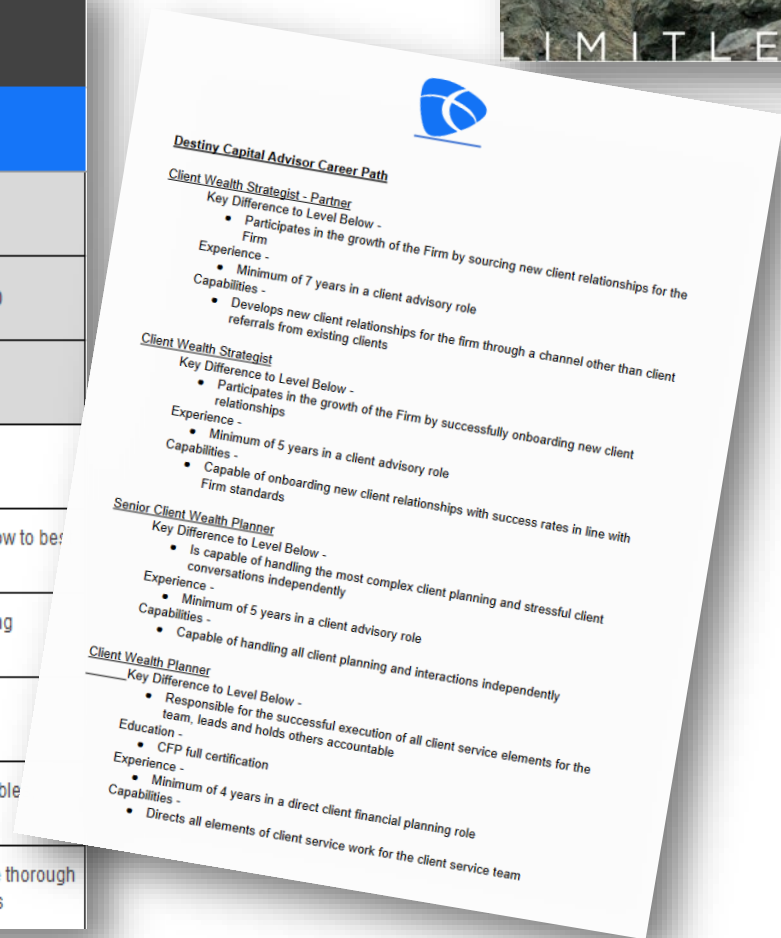


GROWTH: CAREER PATHING



DESTINY CAPITAL MARKETING POSITION PATH FOR GROWTH

DESTINY CAPITAL MARKETING POSITION PATH FOR GROWTH		
COORDINATOR	MANAGER	DIRECTOR
Investment News: \$47,000	Investment News: \$61,750	Investment News: \$72,000
Finance & Banking Salary Avg: \$45,000-\$49,000	Finance & Banking Salary Avg: \$52,000-\$56,000	Finance & Banking Salary Avg: \$70,000-\$77,000
Broad Salary Range: \$42,000 - \$60,000 all in	Broad Salary Range: \$40,000-\$80,000	Broad Range: \$50,000 - \$110,000
Little Agency	More Agency	Agency Oversight
Little requirement on writing content for materials	Must display an understanding of our brand and services	Have advanced knowledge on our brand, services, and how to best communicate to the market
Assisting team members with day to day marketing tasks and coordinating marketing projects and activities as requested	Managing all marketing for the company and activities within marketing	Planning, developing and implementing effective marketing communication campaigns
Organizing the production of branded items such client materials, e-mails, etc	Developing the marketing strategy for the company in line with company objectives	Using the full marketing mix for the company's marketing communications
Supporting the team by coordinating and collating content	Co-ordinating marketing campaigns with sales activities	Writing copy for all marketing collateral, including deliverable letters, emails and websites
Producing additional marketing communications, such as flyers, brochures and exhibition-related projects	Overseeing the company's marketing budget	Understanding the product and customer profile and write thorough specs for each and create supporting marketing materials



GROWING YOUR TEAM



CAREER PATHS FOR CLIMBERS



Make "growth & development" a requirement



Allocate time for growth



Ongoing conversations and coaching

MANAGING PERFORMANCE



PERSONAL FEEDBACK

Specific
Real-time



CASUAL CHECK-INS

Personal
State
Priorities

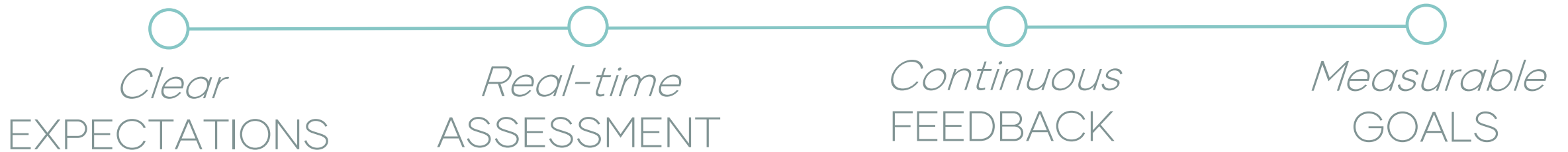


FORMAL REVIEWS

Productivity
Performance
Personal Attributes

MANAGING PERFORMANCE

WHAT TO COVER DURING CHECK-INS



WHEN PERFORMANCE ISN'T OPTIMAL

WHERE IS THE PROCESS BREAKDOWN?
WHAT'S BENEATH THE BEHAVIOR?
SEEK ALIGNMENT, GET AGREEMENT
SET "WHAT THE ROLE NEEDS" AS
YARDSTICK FOR MEASURING SUCCESS

PROCESS	PERSON
NO PROCESS	WRONG PERSON
PROCESS BREAKDOWN	WRONG TRAINING & SUPPORT
BAD PROCESS	WRONG SEAT

PERFORMANCE REVIEW

(Your logo here)

Team Member: _____ Hire Date: _____
 Reviewed by: _____ Today's Date: _____

I. YOU MAKE A DIFFERENCE!
EVALUATION OF SELF PERFORMANCE

Please complete the following evaluation of yourself as if you were a manager of this firm. **Be honest and thorough!** Your answers will be reviewed alongside your team leader's actual responses during your Review Meeting. We hope this activity will allow you a time of self-reflection, while also enabling us to have an active discussion regarding your role and contribution.

"OVERALL RATING WILL BE COMPLETED DURING YOUR REVIEW MEETING"

1 - Unsatisfactory - Unacceptable performance suggesting a lack of willingness and/or ability to perform the requirements of the position.

2 - Marginal - Performs many duties in a capable manner; meets some goals and objectives, but requires improvement to achieve overall acceptable performance.

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5 - Exceptional - Consistently far exceeds all expectations, always achieves exceptional results well beyond those expected.

Area	PROFESSIONAL	Team Membe	Team Leader
Expertise	Exhibits a mastery of knowledge, and an effort to continue educational, technical, and applicable growth in areas of assigned operation.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Reliability	Is efficient and decisive when working autonomously, and exhibits adequate time management and follow-through skills. Prepares for meetings on time and prepared.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Team Minded	Exhibits a desire to collaborate with peers, team & supervisors to promote team focus, growth, communication & effectiveness.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Task Efficiency & Timeliness	Is effective in planning, organizing and efficiently handling tasks. Meets deadlines accurately and with complete work, showing appropriate attention to detail.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Professional Demeanor	Maintains a high level of professionalism when dealing with clients, fellow team members and outside vendors.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Software	Exhibits adequate knowledge and understanding of relevant software and computer programs, meets standard of use.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Firm Function	Shows adequate understanding of firm's mission statement, including overall function and responsibilities to it's clients, firm philosophy and service lines.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Firm Policies	Exhibits an awareness of and adheres to firm wide policies, procedures and expectations.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Area	COMMUNICATION	Team Membe	Team Leader
Communication Dynamics	Able to effectively communicate in both one-on-one and group environments, engages and respects other's input.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Listening & Expressing	Effective in obtaining understanding from others, and conveying meaning of ideas, both orally and in writing.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Presentation Skills	Prepares regularly for presentations, weaves the message into a story or a personal anecdote. Communications effectively with voice project and variation.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Problem Solving	Takes initiative to present perceived issues, AND proposed solutions to management.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Reporting	Provides relevant and timely information to management, co-workers, subordinates and clients.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Seeks Counsel	Readily seeks additional guidance or clarity when confronted with unfamiliar or ambiguous tasks.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Area	PERSONAL	Team Membe	Team Leader
Ambition	Shows creativity, initiative, vision and enthusiasm in setting goals for both personal career and firm wide development.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Attitude	Demonstrates a positive, can-do, amiable attitude, especially in the face of direction, ideas, suggestions, challenges and constructive criticism.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □
Appearance	Adheres adequately to company dress code policy and personal appearance expectations.	1 2 3 4 5 □ □ □ □ □	1 2 3 4 5 □ □ □ □ □



1. You Make a Difference!

- Professional
- Communication
- Personal
- Core Capabilities
- Core Position Duties
- Additional Efforts



2. Where Are You Going?



3. Tell Us About Us



4. Your Ideas Matter!



5. Our Team is our Biggest Asset



LEARN MORE

- Drive: The Surprising Truth About What Motivates Us, Daniel Pink
- The Culture Code: The Secrets of Highly Successful Groups, Daniel Coyle
- The Effective Executive: The Definitive Guide to Getting the Right Things Done, Peter Drucker
- The Five Dysfunctions of a Team: A Leadership Fable, Patrick Lencioni
- Tribes: We Need You to Lead Us



ADAPT & APPLY

- Use the Limitless learning resources to adapt and apply what you learn in your practice.
- Follow the Staffing for Success Learning Path for deeper learning.
- Read the Managing, Rewarding & Growing Teams Guidebook. Download the resources and samples for reference.
- Read the Professional Development Process Guidebook Download the resources and samples for references.
- Reference the Building & Managing Teams lesson for those with teams.



TAKE ACTION

- Use the Limitless learning resources and samples to draft the following to reflect your situation and preferences:
- Draft Job descriptions for each role to define responsibilities
- Create Career Paths for clear path to create shared ownership of growth
- Design Firm Compensation Plan to set compensation standards and structure. Use Individual Compensation Template for each position
- Use Performance Review Form and Team Check-In Form to keep communication lines open and encourage collaboration and learning.



LIMITLESS Q&A