Contents

[#1 ⭐ Clients – Billable - XXX / 10 3](#_Toc177037608)

[#2 ⭐ Sentiment – Clients - XXX / 10 3](#_Toc177037609)

[#3 ⭐ Sentiment – Peers - XXX / 10 3](#_Toc177037610)

[#4 ⭐ Sentiment - State Managers - XXX / 10 3](#_Toc177037611)

[#5 ⭐ Sentiment - Review Manager - XXX / 10 3](#_Toc177037612)

[#6 ⭐ Last Year’s Goals Progress (After Prep Tasks) - XXX / 10 4](#_Toc177037613)

[#7 Prospects – Spec Reviews 4](#_Toc177037614)

[#8 Prospects - Initial Meetings 4](#_Toc177037615)

[#9 Exams 5](#_Toc177037616)

[#10 Videos 5](#_Toc177037617)

[#11 Updates – Rules 5](#_Toc177037618)

[#12 Updates – Intranet 5](#_Toc177037619)

[#13 Updates – SugarLearning 6](#_Toc177037620)

[#14 Sprint Review Emails 6](#_Toc177037621)

[#15 CTFs 6](#_Toc177037622)

[#16 Helping others 7](#_Toc177037623)

[#17 Inbox Count 7](#_Toc177037624)

[#18 Client Love 8](#_Toc177037625)

[#19 Any other relevant PowerBI Reports to look at 8](#_Toc177037626)

Editing Note: All Sections in this document should use the settings “Keep with next” and “Keep lines together” to ensure they do not span over multiple pages. See the screenshot:  
A screenshot of a computer

Description automatically generated

**Figure: These settings will keep things bunched together**

## #1 ⭐ Clients – Billable - XXX / 10

How much work have you done for clients?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} is at {{ PERCENTAGE }}% utilization and has billed ${{ DOLLARS }}**

<https://app.powerbi.com/groups/3fe9ebc5-63d6-4385-820b-adbe178ccfa0/reports/d09cff56-de7f-4387-b863-6208adcd28ae/ReportSection2?experience=power-bi>

## #2 ⭐ Sentiment – Clients - XXX / 10

How do clients feel about your work?

e.g. [the three A's](https://github.com/SSWConsulting/SSW.Rules.Content/blob/piers-sinclair-patch-1/being-a-good-consultant)

**{{ CLIENT RETRO NOTES }}**

## #3 ⭐ Sentiment – Peers - XXX / 10

How do your peers feel about your work?

**{{ PEERS RETRO SUMMARY }}**

## #4 ⭐ Sentiment - State Managers - XXX / 10

How does your State Manager feel about your work?

**{{ STATE MANAGER RETRO SUMMARY }}**

## #5 ⭐ Sentiment - Review Manager - XXX / 10

How does your Review Manager feel about your work?

**{{ REVIEW MANAGER RETRO SUMMARY }}**

## #6 ⭐ Last Year’s Goals Progress (After Prep Tasks) - XXX / 10

How well have you done completing the goals from last year?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }}’s Trello**

**{{ LINK TO TRELLO }}**

## #7 Prospects – Spec Reviews

How many Spec Reviews have you done and what was the quality of your contribution like?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} has done {{ NUMBER }} Spec Reviews**

<https://app.powerbi.com/groups/3fe9ebc5-63d6-4385-820b-adbe178ccfa0/reports/2a9e3d15-15cf-4ac7-a72d-25540074553b/ReportSection505e0a36c68b450c0554?experience=power-bi>

## #8 Prospects - Initial Meetings

How many Initial Meetings have you done and what was the quality of your contribution like?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} has done {{ NUMBER }} initial meeting**

<https://app.powerbi.com/groups/3fe9ebc5-63d6-4385-820b-adbe178ccfa0/reports/2a9e3d15-15cf-4ac7-a72d-25540074553b/ReportSectionc5a72affb01a15008154?experience=power-bi>

## #9 Exams

How many Microsoft and/or Scrum exams have you done?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} has done {{ NUMBER }} exams in the past year**

**{{ LINK TO EMPLOYEE BENEFITS }}**

## #10 Videos

How many videos and User Groups have you done?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} done {{ NUMBER }} videos**

**{{ LINK TO YOUTUBE PLAYLIST }}**

## #11 Updates – Rules

How many Rules have you done and what was the quality of your contribution like?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} edited {{ NUMBER }} rules**

**{{ LINK TO LIST OF THEIR RULES EDITS }}**

## #12 Updates – Intranet

How many updates to standards in the intranet have you done and what was the quality of your contribution like?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} edited {{ NUMBER }} SharePoint standards ({{ NUMBER } docs edited in total)**

**{{ LINK TO INTRANET EDITS }}**

## #13 Updates – SugarLearning

How many SugarLearning updates have you done and what was the quality of your contribution like?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} edited {{ NUMBER }} SugarLearning items**

**{{ LINK TO SUGARLEARNING UPDATES }}**

## #14 Sprint Review Emails

How many Sprint Review Emails have you done and what was the quality of your contribution like?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} has done {{ NUMBER }} Sprint Review emails in the last year**

<https://app.powerbi.com/groups/3fe9ebc5-63d6-4385-820b-adbe178ccfa0/reports/2a9e3d15-15cf-4ac7-a72d-25540074553b/ReportSection22c757c8959096361314?experience=power-bi>

## #15 CTFs

How many CTFs have you helped with and what was the quality of your contribution like?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} helped with {{ NUMBER }} CTFs**

**{{ LINK TO CTF DATA }}**

## #16 Helping others

How many ['Checked by xxx'](https://www.ssw.com.au/rules/checked-by-xxx/) emails have you done?

How many people have you mentored?

What other ways have you been helping people?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} did {{ NUMBER }} checked bys**

<https://app.powerbi.com/groups/a6f9af59-ce6c-4da2-b789-49adc1448d38/reports/19c1a49f-29b6-4c7e-bef9-7074526e30f6/ReportSection246a6a701847f354eb89?experience=power-bi>

## #17 Inbox Count

How close is your inbox to 0?

How happy is your Review Manager with your inbox throughput?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} has {{ NUMBER }} emails in their inbox**

<https://app.powerbi.com/groups/5c97064b-2208-47fe-97d2-0d45e7dd275c/reports/b9cd879d-1af1-41ef-8318-3a3599de1f1d/ReportSection?experience=power-bi>

## #18 Client Love

How often have you been doing “client love” by following this rule <https://www.ssw.com.au/rules/weekly-client-love/> ?

{{ SCREENSHOT }}

**Figure: {{ EMPLOYEE NAME }} has {{ NUMBER }} emails in their inbox**

<https://app.powerbi.com/groups/3fe9ebc5-63d6-4385-820b-adbe178ccfa0/reports/db5783bf-d5cc-421c-98d6-7e9eff446b9d/ReportSection3509a4e254a1b06df86e?experience=power-bi>

## #19 Any other relevant PowerBI Reports to look at

e.g. Sales people look at Sales Reports etc

🎉Congrats. You have finished. Now go to the other doc and check off “02”