



SagePoint
S O F T W A R E TM
optimize your workforce



Resource Summary Worksheet

A standardized tool to capture
and evaluate capabilities

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Introduction

The **SagePoint Resource Summary Worksheet** captures and presents a candidate's experience in a compact, objective, and standardized format. This worksheet makes presenting and selecting candidates for an internal position or a partner request much easier, faster, and more accurate. This is what a resume should be!

Note: we are happy to provide a branded version of this tool, [contact us to get one.](#)

Instructions

The attached worksheet should be completed by the candidate. Completing the worksheet is a 5-step process that should take about 15 minutes. It will be helpful if the candidate has his or her resume handy during the process.

- **Step 1: Complete Profile.** On the first page, enter your contact profile, education, professional and industry certifications, security clearances, and a personal statement (a free writing area to capture information not captured elsewhere).
- **Step 2: List Skills.** In the “My Skills” section, list all skills you have. If this form is being completed for an open position, with a focus on skills relevant to it.
- **Step 3: List Assignments.** In the “My Assignments” section, list all assignments (tasks, projects, or jobs) that showcase the use of your skills. There's space for additional assignments on the following page.
- **Step 4: Assign Skills.** Each assignment block has slots for up to 4 skills. Populate these slots with skills relevant to that assignment from the “My Skills” list.
- **Step 5: Rate Skills.** Some skills are more critical to the success of an assignment than others. Indicate the importance of each skill by filling in the appropriate # of stars (1 to 4 scale).

Note: In the “My Skills” list, there is a space next to each skill to tally the number of assignments on which each skill was used – you should fill this out at the end.

About SagePoint Software, Inc.

SagePoint Software™ is a Software-as-a-Service (SaaS) toolset you can use to unlock the full potential of every resource and partner.

This worksheet should be packaged with [our free ebook](#) on resource evaluation best practices. If you found these useful, get more free help with your resource evaluation and partner management challenges by [scheduling a customized demonstration.](#)

Resource Summary Worksheet



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Contact Profile

Full Name:
Address 1:
Address 2:
City, State, Zip:
Phone:
E-mail:
Other (linkedin, etc):

Education

Institution:
Degree Obtained:
Dates Attended: / / to / /
Institution:
Degree Obtained:
Dates Attended: / / to / /
Institution:
Degree Obtained:
Dates Attended: / / to / /
Institution:
Degree Obtained:
Dates Attended: / / to / /

Security Clearances

	Current? (mark an X if yes)	Expiration (MM/DD/YY)
Clearance Level 1:	<input type="checkbox"/>	/ /
Clearance Level 2:	<input type="checkbox"/>	/ /
Clearance Level 3:	<input type="checkbox"/>	/ /
Clearance Level 4:	<input type="checkbox"/>	/ /
Clearance Level 5:	<input type="checkbox"/>	/ /

Personal Statement

Certifications

	Current? (mark an X if yes)	Expiration (MM/DD/YY)
Certification 1:	<input type="checkbox"/>	/ /
Certification 2:	<input type="checkbox"/>	/ /
Certification 3:	<input type="checkbox"/>	/ /
Certification 4:	<input type="checkbox"/>	/ /
Certification 5:	<input type="checkbox"/>	/ /
Certification 6:	<input type="checkbox"/>	/ /
Certification 7:	<input type="checkbox"/>	/ /
Certification 8:	<input type="checkbox"/>	/ /
Certification 9:	<input type="checkbox"/>	/ /
Certification 10:	<input type="checkbox"/>	/ /
Certification 11:	<input type="checkbox"/>	/ /
Certification 12:	<input type="checkbox"/>	/ /
Certification 13:	<input type="checkbox"/>	/ /
Certification 14:	<input type="checkbox"/>	/ /
Certification 15:	<input type="checkbox"/>	/ /

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My Skills

of Uses
(mark an X for each use)

Skill 1:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 2:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 3:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 4:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 5:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 6:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 7:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 8:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 9:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 10:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 11:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 12:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 13:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 14:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 15:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 16:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 17:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 18:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 19:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Skill 20:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

My Assignments

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆☆
Skill 2:	☆☆☆☆☆
Skill 3:	☆☆☆☆☆
Skill 4:	☆☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆☆
Skill 2:	☆☆☆☆☆
Skill 3:	☆☆☆☆☆
Skill 4:	☆☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆☆
Skill 2:	☆☆☆☆☆
Skill 3:	☆☆☆☆☆
Skill 4:	☆☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆☆
Skill 2:	☆☆☆☆☆
Skill 3:	☆☆☆☆☆
Skill 4:	☆☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆☆
Skill 2:	☆☆☆☆☆
Skill 3:	☆☆☆☆☆
Skill 4:	☆☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆☆
Skill 2:	☆☆☆☆☆
Skill 3:	☆☆☆☆☆
Skill 4:	☆☆☆☆☆

Resource Summary Worksheet



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My Assignments (Continued)

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆
Skill 2:	☆☆☆☆
Skill 3:	☆☆☆☆
Skill 4:	☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆
Skill 2:	☆☆☆☆
Skill 3:	☆☆☆☆
Skill 4:	☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆
Skill 2:	☆☆☆☆
Skill 3:	☆☆☆☆
Skill 4:	☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆
Skill 2:	☆☆☆☆
Skill 3:	☆☆☆☆
Skill 4:	☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆
Skill 2:	☆☆☆☆
Skill 3:	☆☆☆☆
Skill 4:	☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆
Skill 2:	☆☆☆☆
Skill 3:	☆☆☆☆
Skill 4:	☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆
Skill 2:	☆☆☆☆
Skill 3:	☆☆☆☆
Skill 4:	☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆
Skill 2:	☆☆☆☆
Skill 3:	☆☆☆☆
Skill 4:	☆☆☆☆

Assignment Title:	
Company:	
Description:	
Start Date: / /	
<input type="checkbox"/> End Date: / /	
<input type="checkbox"/> Currently Working On	
Effort Hrs:	
<input type="checkbox"/> Per Week	
<input type="checkbox"/> Total	
Skill 1:	☆☆☆☆
Skill 2:	☆☆☆☆
Skill 3:	☆☆☆☆
Skill 4:	☆☆☆☆