Technical Support Assessment

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| **Employee:** | Brandon Stevens |
| **Position Title:** | Technical Support Engineer |
| **Manager:** | Jennifer Questa |
| **Review Date:** | 4/7/2017 |

The Perforce performance assessment process:

* Provides an opportunity for open discussion regarding a team member’s responsibilities and contributions aligning with the review period.
* Increases the understanding of how a team member’s performance supports team and organizational goals.
* Improves the clarity of performance expectations.
* Creates an opportunity to discuss career and/or personal development related goals.
* Establishes job specific goals that are meaningful to the individual, the team and the organization.
* Creates a better understanding of how compensation decisions are made.

Instructions for completing an assessment:

* Section One: The Manager will provide a performance commentary aligning with the key skill dimension areas.
* Section Two: Together, the Team Member and their Manager will provide input on Career/Professional Development Objectives that are to be considered for the next review period.
* Section Three: The Team Member and their Manager will agree upon Goals that are to be measured and evaluated during the next review period.

The 2017 Corporate Strategic Goals are as follows:

* + Increase organic revenue
  + Improve maintenance revenue streams
  + Enhance lead gen capabilities
  + Expand product functionality
  + Close strategic acquisitions
  + Leverage International markets
  + Build an efficient, growth oriented organization
* Section Four: The Team Member and their Manager will make their final comments regarding the Assessment and sign in the designated areas.
* Section Five: The Manager will provide the overall Performance Rating.
* Closure: The Manager will finalize the Assessment by taking into consideration any additional information discussed during the assessment process.
* Submit: The Manager will provide a final copy to their Team Member and to Human Resources.

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| **Perforce Rating Definitions:** | |
| **Exceptional Contributor (5)** | * Performance consistently exceeds the job requirements and position objectives. * Is a role model and significant contributor within Perforce. * Is innovative, impactful and strategic. * Performs at the highest level in their profession. |
| **Successful Contributor (4)** | * Performance frequently exceeds the job requirements and position objectives. * Is a highly effective contributor within Perforce. * Is proactive, resourceful and solution driven. * Embraces learning and personal development. |
| **Active Contributor (3)** | * Performance meets the job requirements and position objectives. * Is a dependable contributor and is fully effective within Perforce. * Supports Company goals through results and behaviors. * Is project and task focused. * Needs occasional guidance and/or direction. |
| **Developing Contributor (2)** | * Performance meets some of the job requirements. * Is developing in his/her career path or specific role. * Shows the desire to improve and be mentored. * Needs guidance and/or direction on a regular basis. |
| **Limited Contributor (1)** | * Performance fails to meet the job requirements. * Contributions to his/her team and position responsibilities is lacking. * Often needs guidance and/or intervention. * Behavior, communication and/or productivity can hinder the performance of the department and/or Perforce. |

**Section One – Performance and Skill Assessment**

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| **Dimension** | **Definition** | **Components** |
| **Job, Technical and Product Knowledge** | The awareness, understanding and ability to undertake the role. Maintains awareness of current professional and technological developments. Utilizes these where appropriate to increase effectiveness. | * Job Knowledge * Industry Knowledge * Professional & Technical Knowledge * Product Knowledge (when applicable) |
| Brandon is the junior TSE here, however his ability to jump in headfirst coupled with an eagerness to learn as much as he can makes him the ideal support person. I would consider him proficient in Helix ALM (TestTrack) and Surround SCM, and has a good understanding and working knowledge of QA Wizard.  Brandon does lack some knowledge in the supporting technologies that our products integrate or depend on. For example, a customer had stated that he changed a value in the Windows HOST file, Brandon had to think fast on his feet and do quick research to find out what that was. While not a bad thing as it’s not something encountered often but it’s always good to be on top of industry knowledge. | | |

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| **Dimension** | **Definition** | **Components** |
| **Customer Focus** | Awareness of customer needs and has the desire and ability to provide high service levels to the customer. | * Internal * External * Service |
| Brandon extremely professional and handles all customers no matter their technical level or current mood with the same professional manner. I have audited phone calls where the customer has started out hostile and Brandon’s calm demeanor has soothed them over resulting in a good engagement.   Brandon is always trying to do more for customers. He leans toward being a proactive TSE than a reactive TSE. | | |

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| **Dimension** | **Definition** | **Components** |
| **Communication** | The ability to communicate ideas, views and information in an appropriate manner. Effectively communicates internally and externally. | * Written Communication * Formal Presentation * Persuasion * Influencing * Impact * Fact Finding |
| Brandon’s communication is always professional and geared toward his audience. In written communication he provides explanation and clear concise steps when appropriate. | | |

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| **Dimension** | **Definition** | **Components** |
| **Decision Making** | The ability to take a course of action based upon relevant information. Decision-making is determined by the understanding of a situation and the ability to draw upon one’s analytical and problem solving skills. Produces effective solutions that improve processes. | * Problem Solving * Decision Making * Decisiveness * Analytical Skills * Information Monitoring * Creativity / Innovation |
| Brandon consistently makes correct decisions based on logic and what is best for the customer and for the company. He can quickly assess an issue, make a logical decision, then acts upon his decision. He is also never afraid to admit that he made a mistake and always makes it right. | | |

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| **Dimension** | **Definition** | **Components** |
| **Planning & Organizing** | The ability to plan, structure and organize one’s own workload to reflect and meet the demands and priorities of the business. Identifies goals, initiates action and takes the appropriate steps to achieve the desired result(s). | * Organization * Problem Solving * Planning * Results / Goal Oriented * Follow-up * Energy / Drive |
| Brandon is always organized as evident in his cases. His first responses are always very quick and rarely do they sit without any action on it. He closes items quickly to keep his open cases uncluttered. | | |

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| **Dimension** | **Definition** | **Components** |
| **Teamwork / Working Relationships** | The ability to work in a team, to build relationships, to incorporate team goals, and to work towards team results. | * Contributing to Team and Organizational Success * Building Working Relationships * Persuasion * Communication Skills * Teamwork |
| Brandon is an excellent team player. He is always ready and willing to assist anyone and takes direction well from his team mates. He’s built good relationships with our developers and communicates with them to solve customer issues using our built in processes. He suggests things the team might want to try to do but isn’t hurt if it’s not immediately adopted. | | |

**Section Two – Career/Professional Development**

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| **Identify the areas for career and professional development and what tools or resources will be used to promote development.** |
| With the recent acquisition, Brandon is looking forward to the opportunity to learn about the Helix SCM software. He recognizes that he needs to become more proficient in other environments, ie Linux.  Continual learning – There are still aspects of our products that he is unaware of (for instance License Server API). He will continue to learn and expound on his knowledge on our products to better serve our customer base. |

**Section Three – Goals**

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| **List the goals for the upcoming assessment period. The goals should be SMART goals:**  **S – Specific; M – Measurable; A – Achievable; R – Relevant; T - Timely** |
| * Learn about the Helix SCM software – to answer install/tier 1 questions or more complex. * Become proficient working in Linux environment. * Use the License Server API to create some function writing the script in a language other than C# * Become a SSCM CLI expert. * New TestTrack integrations – Jira and Helix SCM become expert in these. |

**Section Four – Final Comments and Signatures**

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| **Employee Comments:** |
| Comments: Jeni has been a great manager to work for. She is always available to talk to or to answer any questions I have enjoyed working as a TSE and learning each day. I look forward to my future with the company. |
| Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: |

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| **Manager Comments:** |
| Comments: Brandon is a very technically talented TSE. He is dependable, honest, and always working. His communication skills, product knowledge, and ability to learn new things quickly make him an asset to this team. I gave him a grade of 3.25 because he is still learning all the different nuances and supporting technologies required to be an expert in product support. |
| Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: |

**Section Five – Overall Performance Assessment Rating**

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| **Insert Rating** 🗹 (5 being the highest rating) | 5 🞎 4 🞎 3.25 🗹 2 🞎 1 🞎 |

Final Step: The Manager will provide a final copy to their Team Member and to Human Resources.