



Employee Annual Performance Review

Employee Information

Employee Name: **Randall Carver**
Job Title: **Attorney**
Supervisor: **Donald Green**

Department: **Huron**
Date: **03/31/2023**

Evaluation Key

Use this rating key for the following evaluation:

- 1 = *Below Expectations*
Does not meet expectations on a consistent basis
- 2 = *Meets Expectations*
Meets set expectations continually and consistently
- 3 = *Exceeds Expectations*
Meets set expectations and exceeds them on a regular basis

(3) = Exceeds Expectations

(2) = Meets Expectations

(1) = Below Expectations

Job Duties

Accuracy of Work	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Achieves Set Metrics & Objectives	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Attendance & Schedule Adherence	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demonstrates Required Job Skills and Knowledge	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates Problem Solving Skills	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(3) = Exceeds Expectations

(2) = Meets Expectations

(1) = Below Expectations

Professionalism

Open to Constructive Criticism	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offers Constructive Feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes Responsibility for Actions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Displays Proper Office Etiquette (Language, Demeanor, Attire, etc.)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adapts Well to Change	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Displays this Quality

Leadership Qualities

Displays Positive Leadership Qualities with Team



Recognizes Potential Problems and Develops Creative Solutions



Communicates Well with Management



Evaluation Summary

Job Duties:	<u>13</u>
Professionalism:	<u>14</u>
Leadership Qualities:	<u>3</u>
Total:	<u>30</u>

Core Values & GWC Analyzer

DRIVEN	CARING	TEAMWORK	ACCOUNTABILITY	ATTITUDE	ADAPTABLE	GET IT	WANT IT	CAPACITY
+	+	+	+	+	+	Y	Y	Y
RATINGS:						+	+/-	-
						Y	OR	N

Additional Comments:

Randy has done an exceptional job of keeping client cancellations to a minimum and adapting to an ever-evolving business dynamic within the firm. His attrition rate has steadily reduced from an initial rate of 10.7% in March 2023 to a comfortable 3.2% by the end of February 2024. Remarkably, his attrition rate has remained below thresholds since July 2023. Although he has fallen behind on occasion, he has also mostly kept up-to-date and current on file reviews, settlement reviews and approvals, and enrollment document reviews and signatures. When he has fallen behind, he has been quick to get caught up.

On occasion, Randy has overreached with clients in delving into matters outside the scope of our representation, such as discussing and advising about bankruptcy as an alternative, but those encounters have been limited, if not eliminated entirely, in recent months. He has taken constructive criticism, recommendations and advise well when discussed with him.

Randy should try to improve in his call timeliness which has consistently been an issue. Call timeliness, as measured as between 3 minutes before and 3 minutes after a scheduled call, has inexplicably usually been between 50-60%, with a one-time high of only 80% in April 2023, and a low of 49% in June 2023. Areas of improvement for purposes of consult calls include emphasis of the positive aspect of lawsuits and the benefits of debt settlement. Reference to debt settlement should be substituted with reference to debt resolution, although this amendment in reference language is new and does not in any way impact this review. Randy can also potentially improve his engagement with clients by spending additional time advising them about his background and how his experience as an attorney will benefit them during the course of this program. It is also important for Randy to be available at all times during regular working hours to reply to firm or manager concerns as it has been challenging to receive timely responses to questions or concerns on occasion.



HURON
LAW GROUP

Overall, Randy has been a pleasure to work with. He has had a proven record of positive client engagement and minimal cancellations. He has steadily, progressively, and consistently improved over time. Going forward, Randy can continue to improve on his performance by providing continued attention to the ways in which he develops his communication with the firm's clients and detail to the other everyday tasks associated with his role as a much-valued attorney for the firm.

Verification of Review

By signing this form, you confirm that you have discussed this review in detail with your supervisor. Signing this form does not necessarily indicate that you agree with this evaluation.

Employee Signature

Date

Manager Signature

Date