2021 Self Reviews

OCTOBER 2021

PRESENTED BY YOUR PEOPLEX PARTNERS

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Value of the Annual Review

Learning and Development

We use what we learn about our employees to build, source, or create learning and development offerings. We need to hear from leaders, managers, and employees to know what is required for success!

Succession Planning

Year-end reviews play an essential part in our future success at SageSure. As we continue to scale for growth, we need a realistic view of our talent on the bench. This will provide us with a clearer picture of promotions, growing team needs, and skill/talent outages we need to be aware of as we work with current team members or seek outside talent.

Employee Engagement

Genuine employee engagement is a measure of the employee's commitment to SageSure. When we have engaged employees, they provide 23% higher profits, 10% higher customer loyalty, 18% higher productivity and sales, and 43% less turnover.*

*Source: Gallup.com

Why do a Self Review?

ALIGNS YOUR ROLE WITH SAGESURE'S LARGER VISION

GIVES YOU A FOUNDATION FOR THE FUTURE

ALLOWS YOU TO REFLECT ON YOUR ACCOMPLISHMENTS

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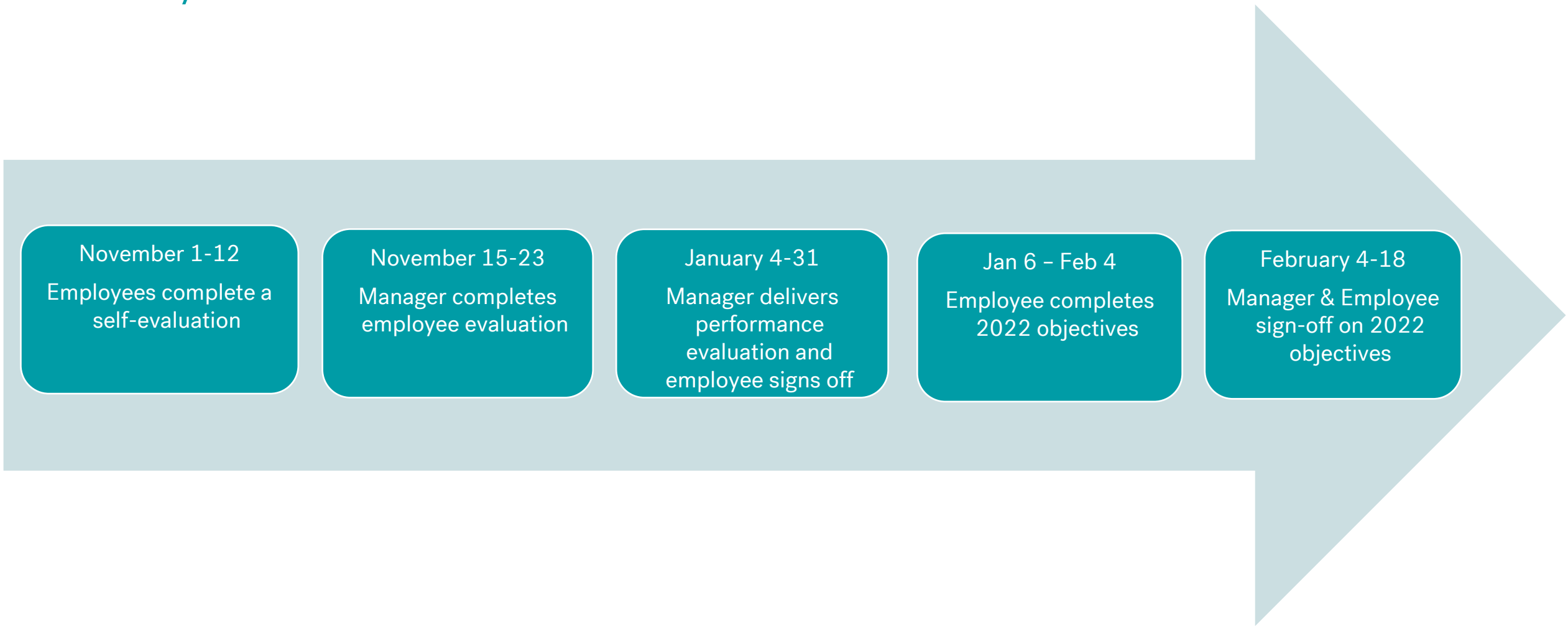
Key Dates

Key Dates



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Who Must Complete A Self-Review?

Employees who joined the organization

before September 1, 2021

must complete a self-review*

* Temps/Interns do not need to complete a self-review

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Changes to Performance Management for 2021

Changes to Performance Management

WEIGHT ALLOCATION

Your performance evaluation will be weighted:

- 50% Business Objectives
- 50% Behavioral Objectives

INFORMAL PEER REVIEW

You will be asked to identify 3 colleagues who can provide thoughtful feedback on your performance.

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Informal Peer Review

Informal Peer Review

In order to allow SageSure to truly provide you with a holistic view of your performance, we are introducing an informal peer review process as a precursor to a formal 360 Feedback Program.

- Peer feedback gives you a true perspective of your performance across the organization
- Peer reviews can also help managers discover hidden talents

We recommend you provide your manager with peers who have worked closely with you and can provide thoughtful feedback on your performance

- Choose people from different departments
- Choose people at different levels of the organization

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How to Peer Review

Here are some suggestions to help provide feedback on your peer.

- Share a specific challenge the employee faced or project/initiative they worked
- Talk about the approach they took to the situation or task
- Tell their manager how the action they took impacted the outcome of the situation or task

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Self Review and You

How to Start

1. BE PROUD
2. BE HONEST AND CRITICAL
3. CONTINUOUSLY STRIVE FOR GROWTH
4. TRACK YOUR ACCOMPLISHMENTS
5. BE PROFESSIONAL

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How to Rate your Objectives

Rating	Description	Ask Yourself:
5	Exceptional	Have I been a role model, consistently surpassing all performance standards for this objective?
4	Highly Effective	Do I regularly perform above the performance standards for this objective? Is there room for improvement?
3	Effective	Did I meet all the minimum requirements of this objective in terms of quality/quantity of work?
2	Developing Effectiveness	Did I struggled to complete all the minimum requirements for this objective but did meet some?
1	Not Effective	Did I really struggle with this objective and did not meet any of the requirements?
N/A	Not Applicable	Does this objective not apply anymore due to changes with my job duties, team, etc..?

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Examples – 4 Highly Effective

Underwriting - Responded to 90% of new business referrals within an average of one day of assignment, meeting the minimum quarterly QA 90%, which includes proper use of authority, thorough rationale/documentation of decision of each case

Marketing - Successfully partnered with Policy Services and Software teams to ensure 100% adherence on all operational communications i.e., branded and written in our tone of voice.

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Examples – 2 Developing Effectiveness

Underwriting - Responded to 86% of new business referrals within an average of one day of assignment, missing the requirement of 90% adherence. Challenges in 2021 impacted my ability to meet this objective include technology issues, and case complexity that required more attention. I did meet the minimum quarterly QA 90%, which includes proper use of authority, thorough rationale/documentation of decision of each case. To help achieve this, I have created a formal process to help me meet the 90% adherence.

Marketing- Working on partnership with Policy Services and Software teams to ensure most operational communications are branded and written in our tone of voice. The goal is 100% brand adherence however challenges in 2021 included multiple competing business priorities which took my attention away from this objective. In the next year, I plan to use time management tools to help keep me focused on the most important priorities.

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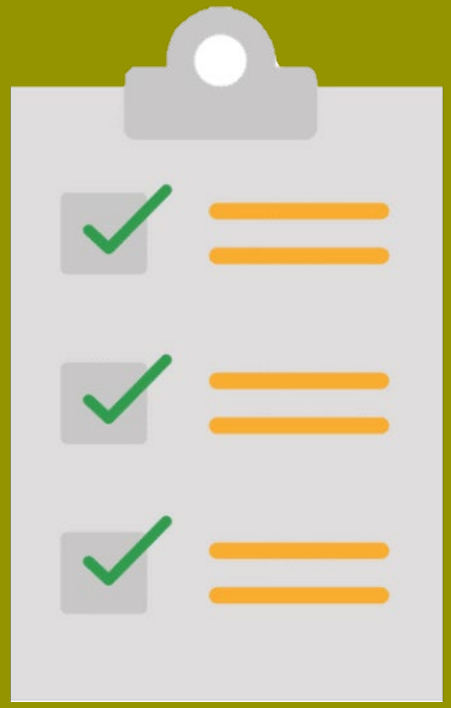
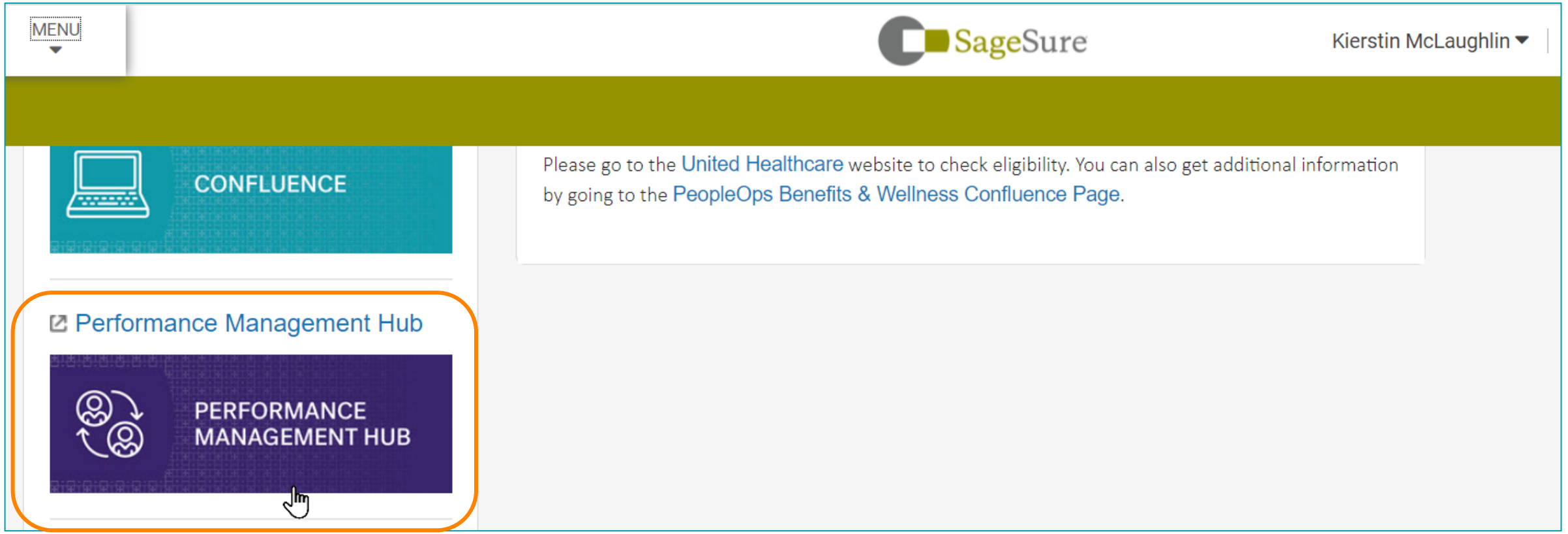
Complete your Self-Review



Log into the Performance Hub



Finding the Year-End Self Review

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Selecting the Performance Task

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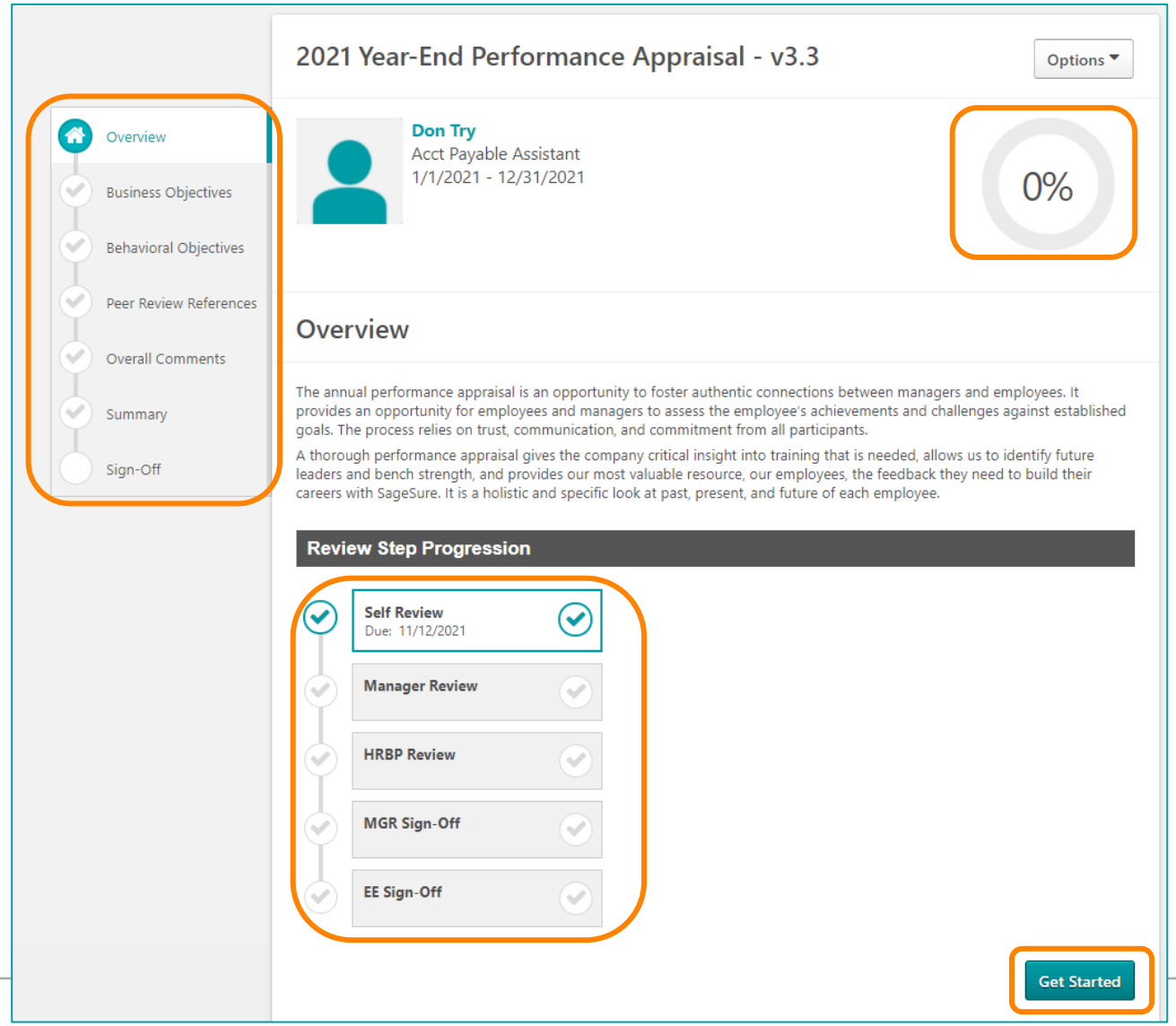
Year-End Appraisal – Getting Started



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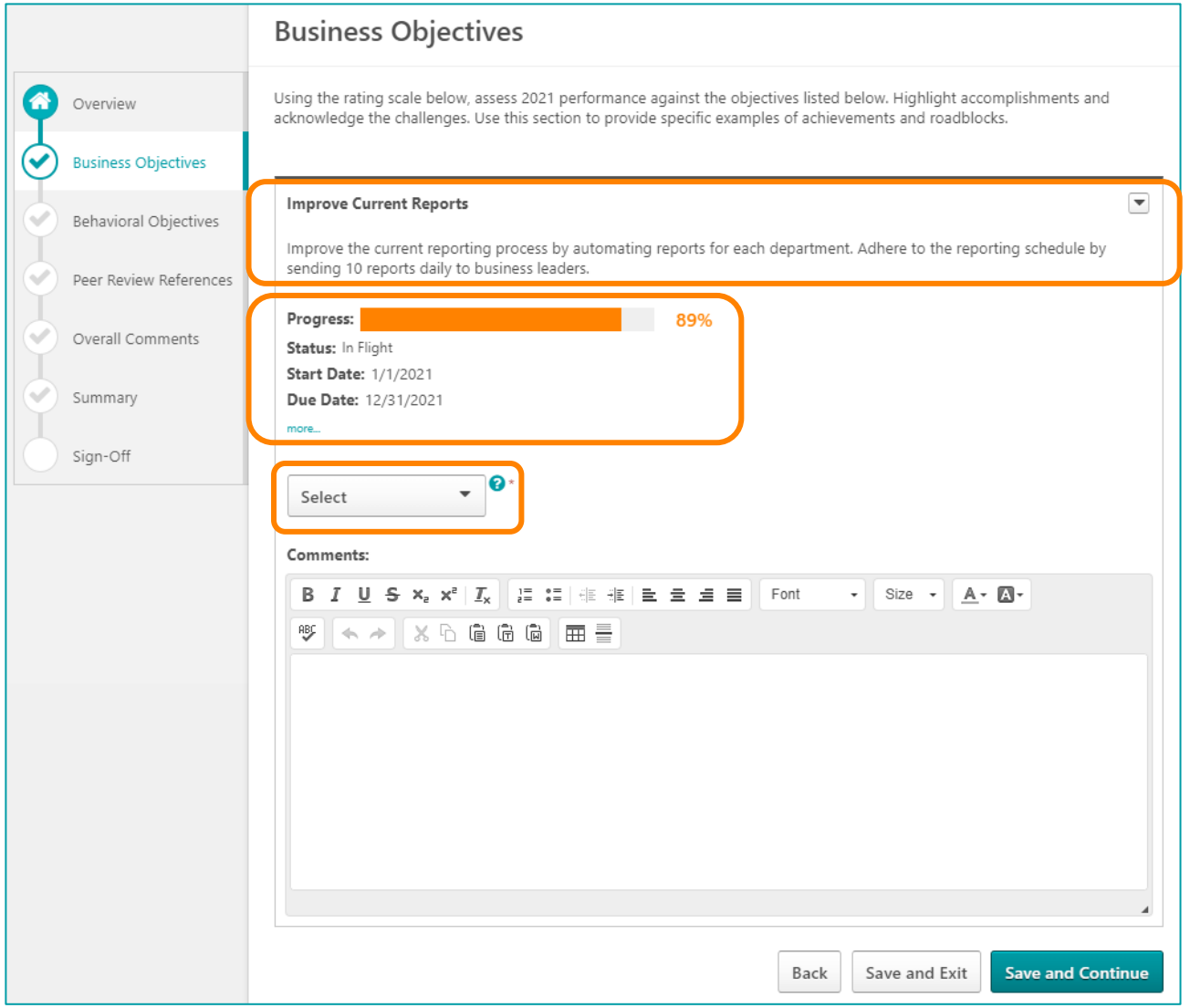
Rating & Comments



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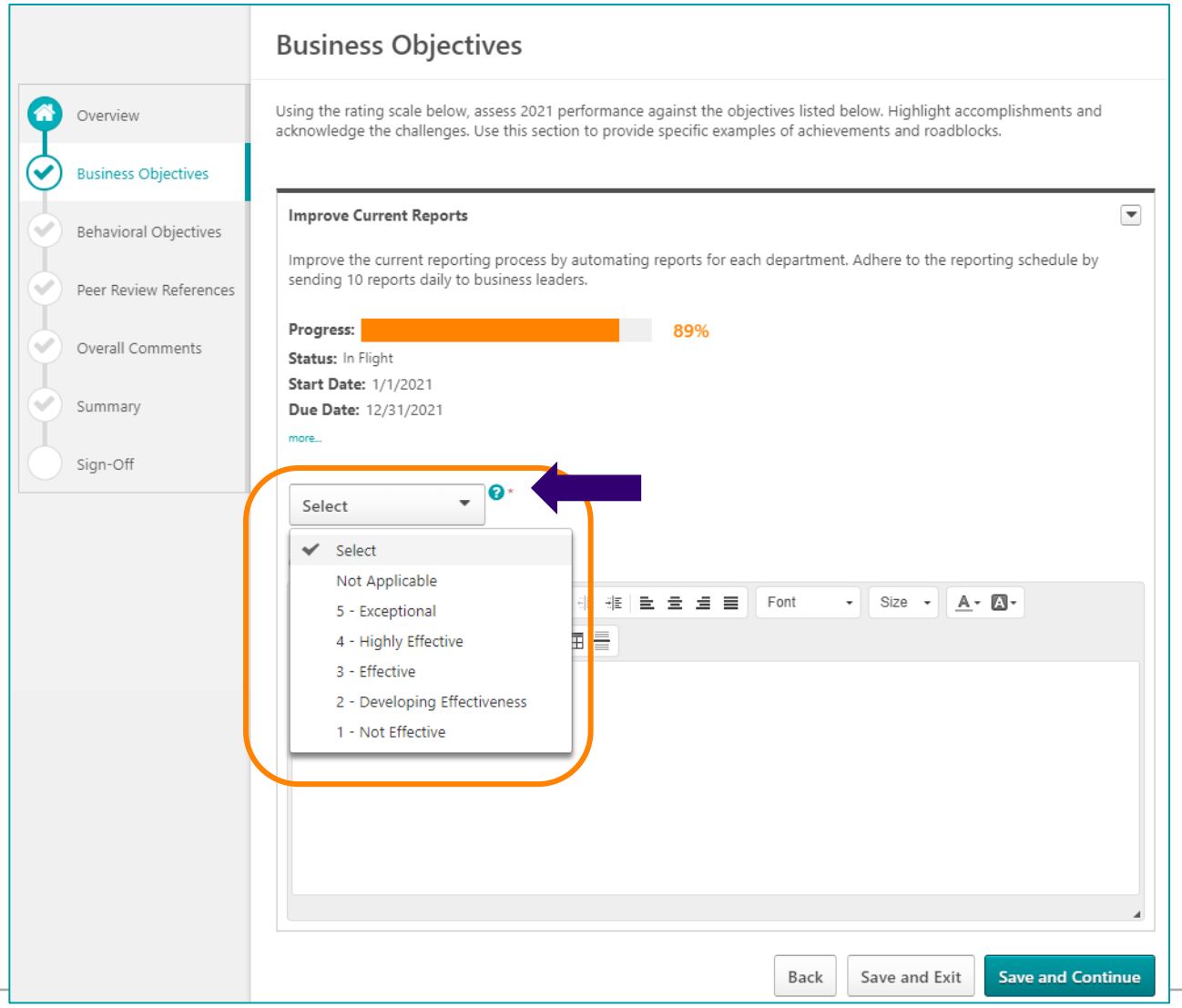

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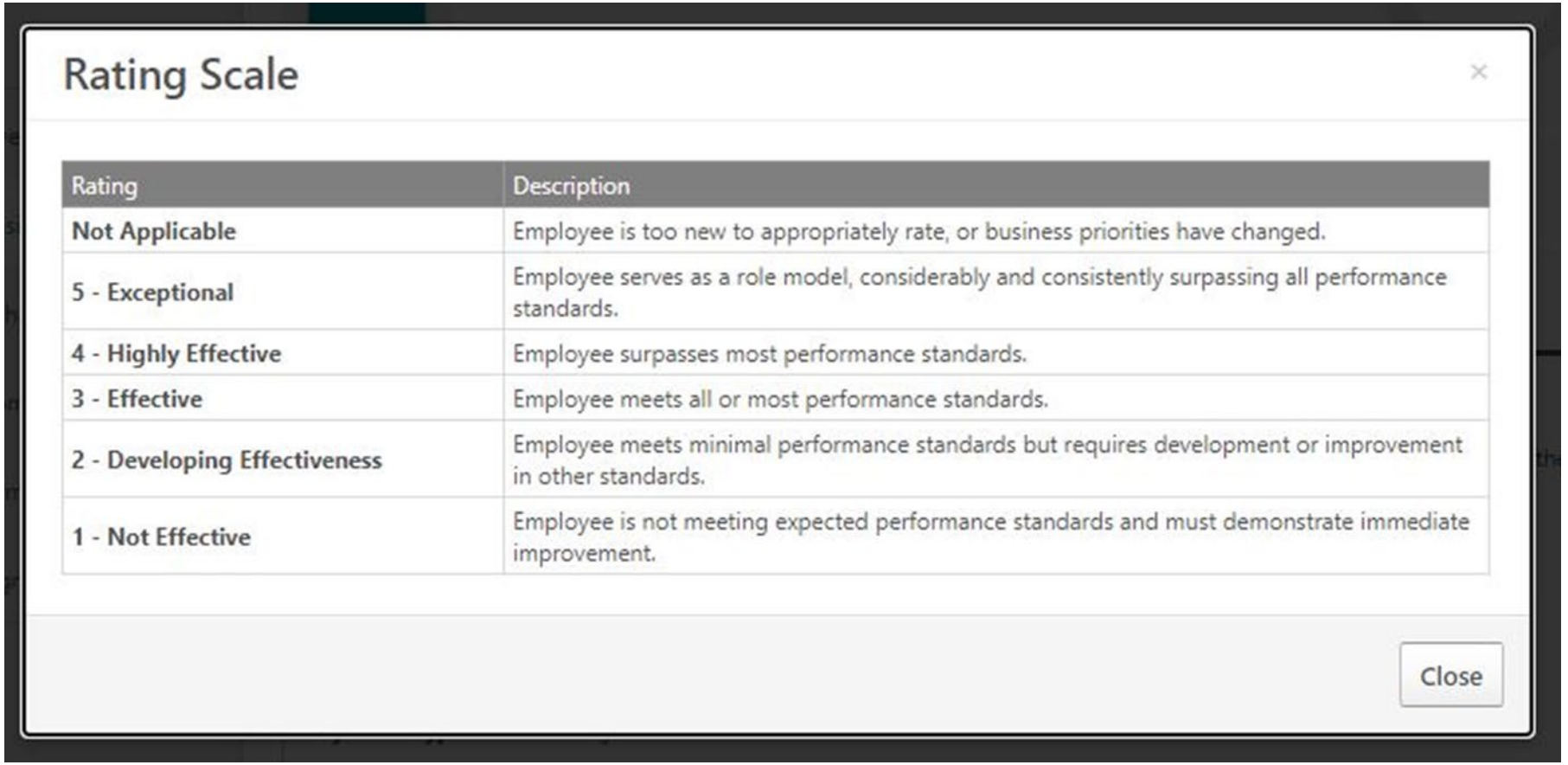

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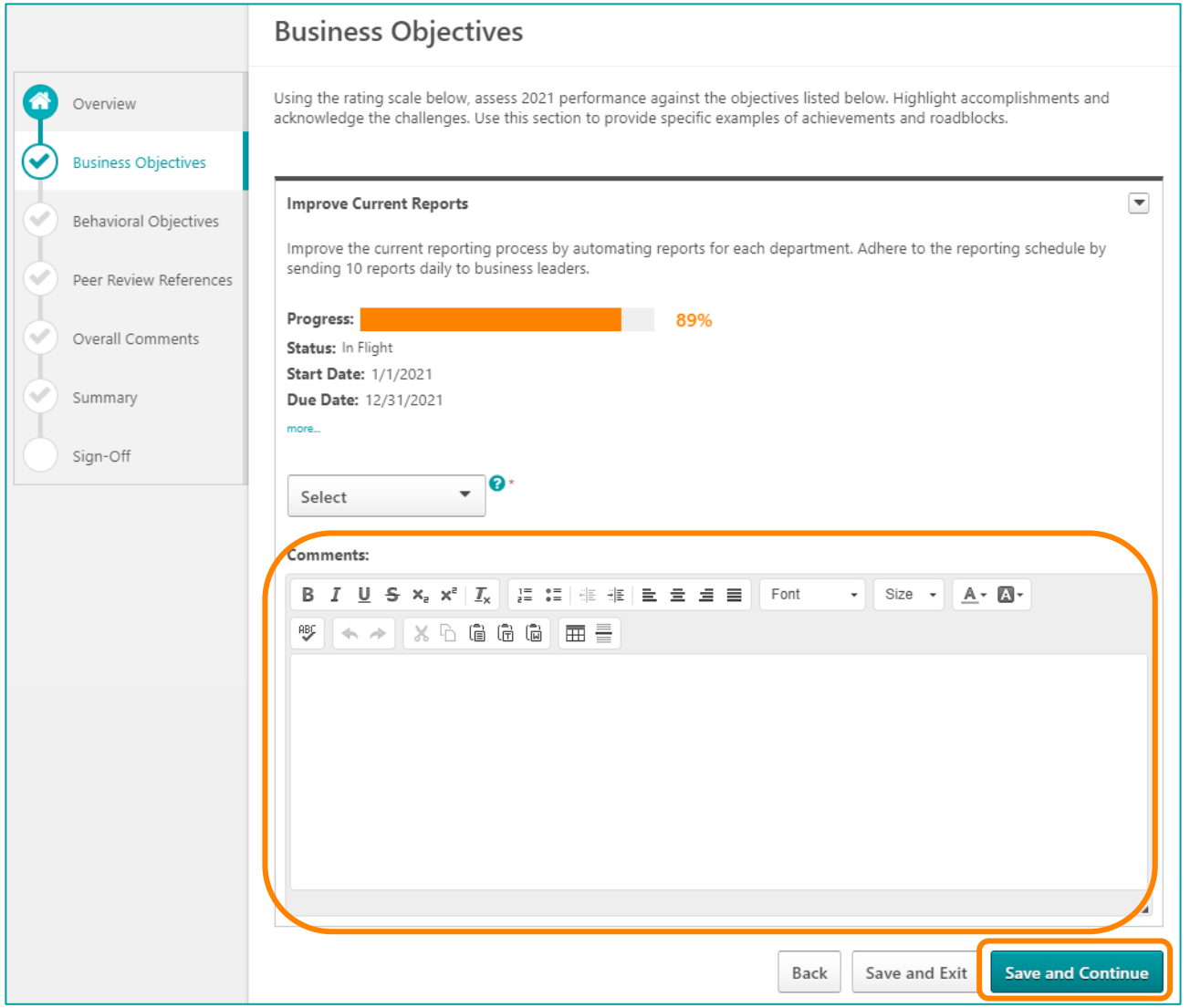
Rating & Comments



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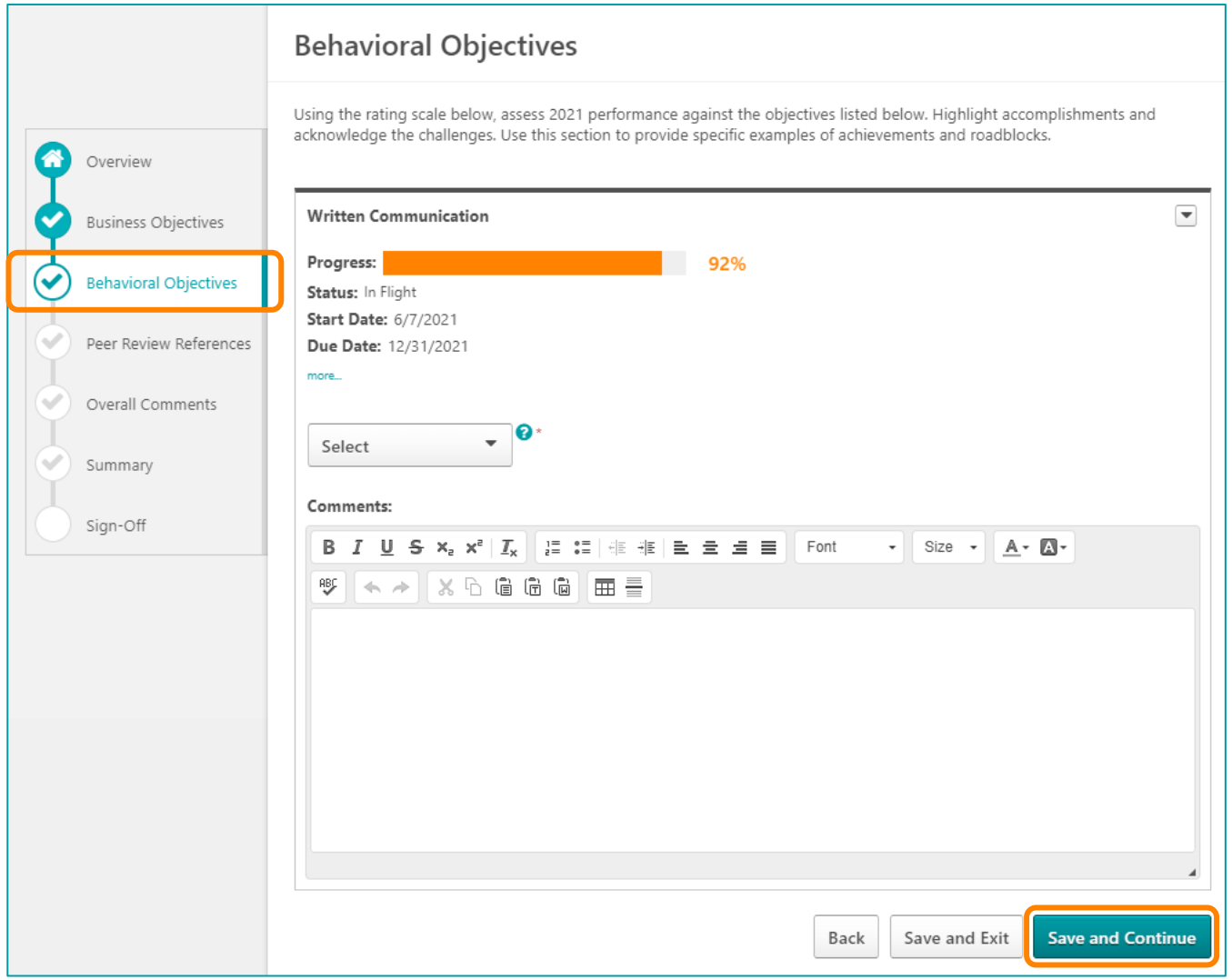

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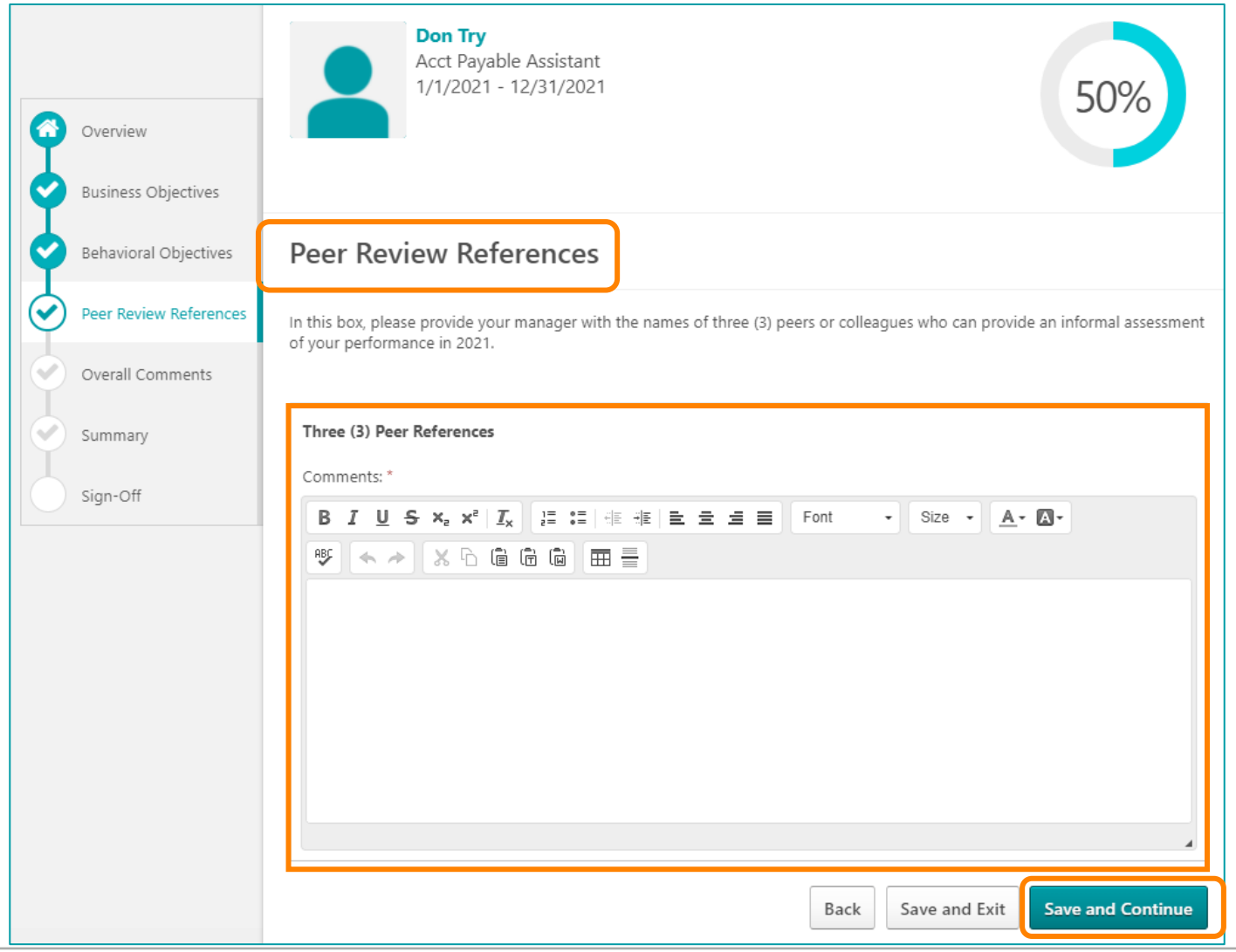
Peer Review



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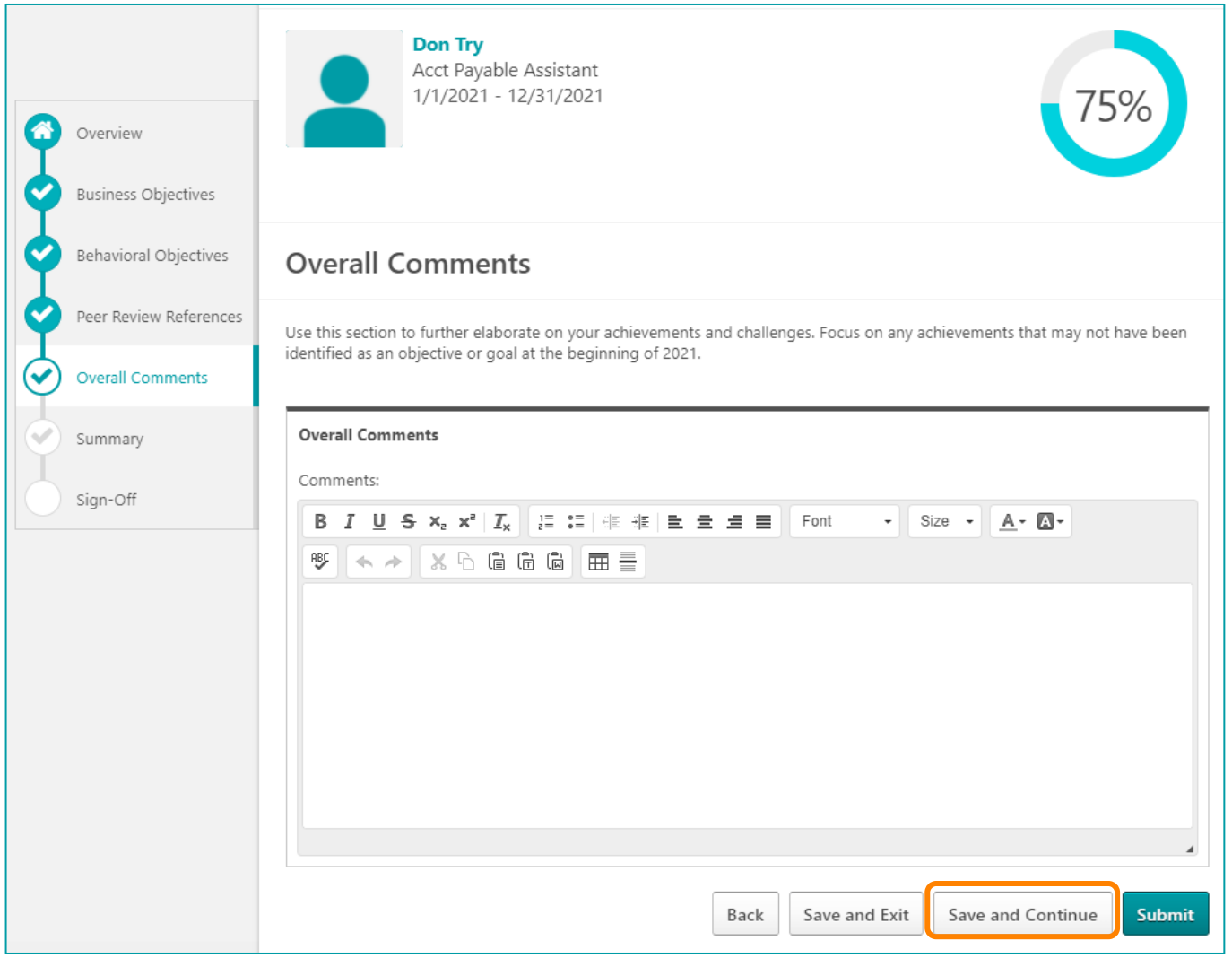
Overall Comments



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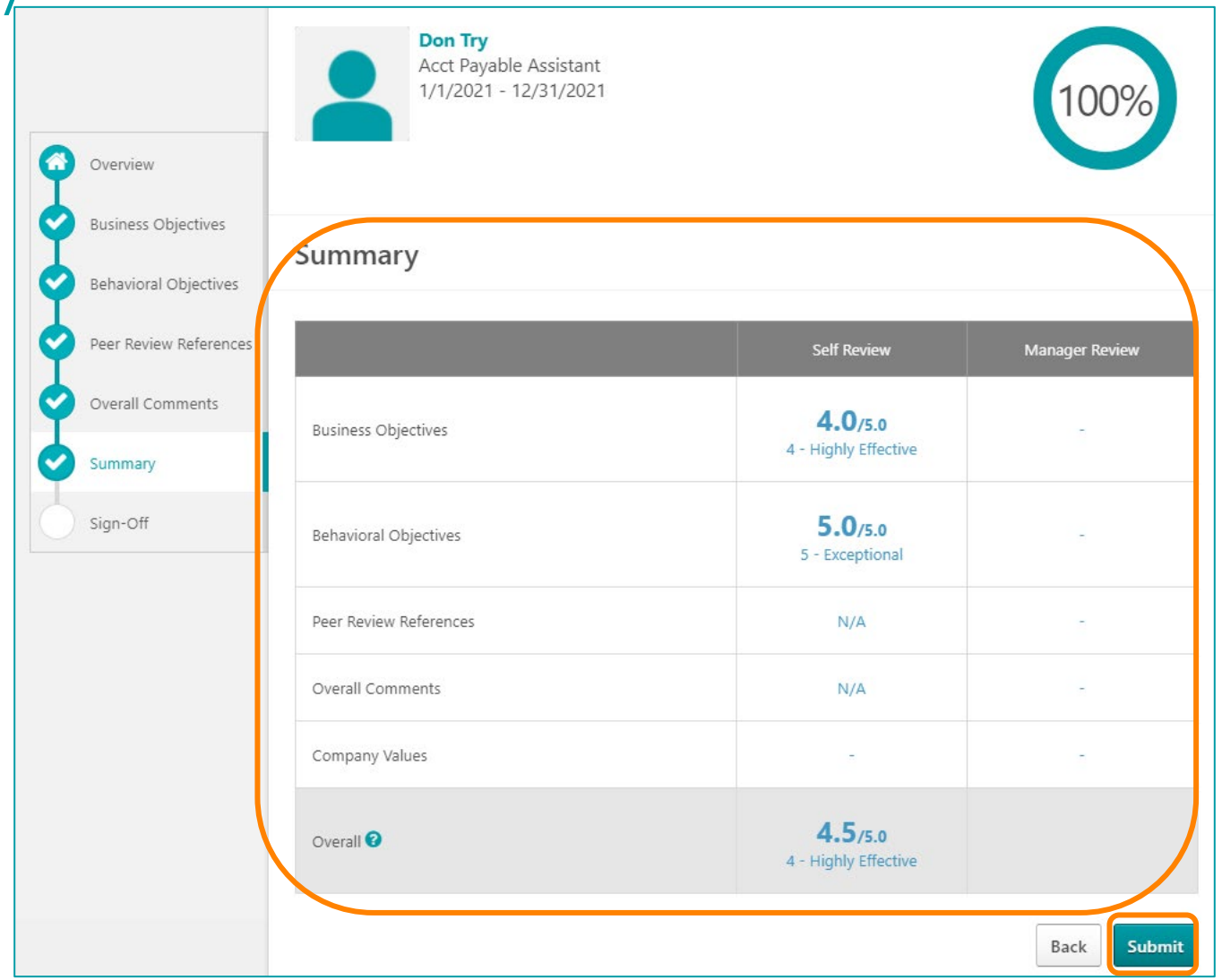
Summary



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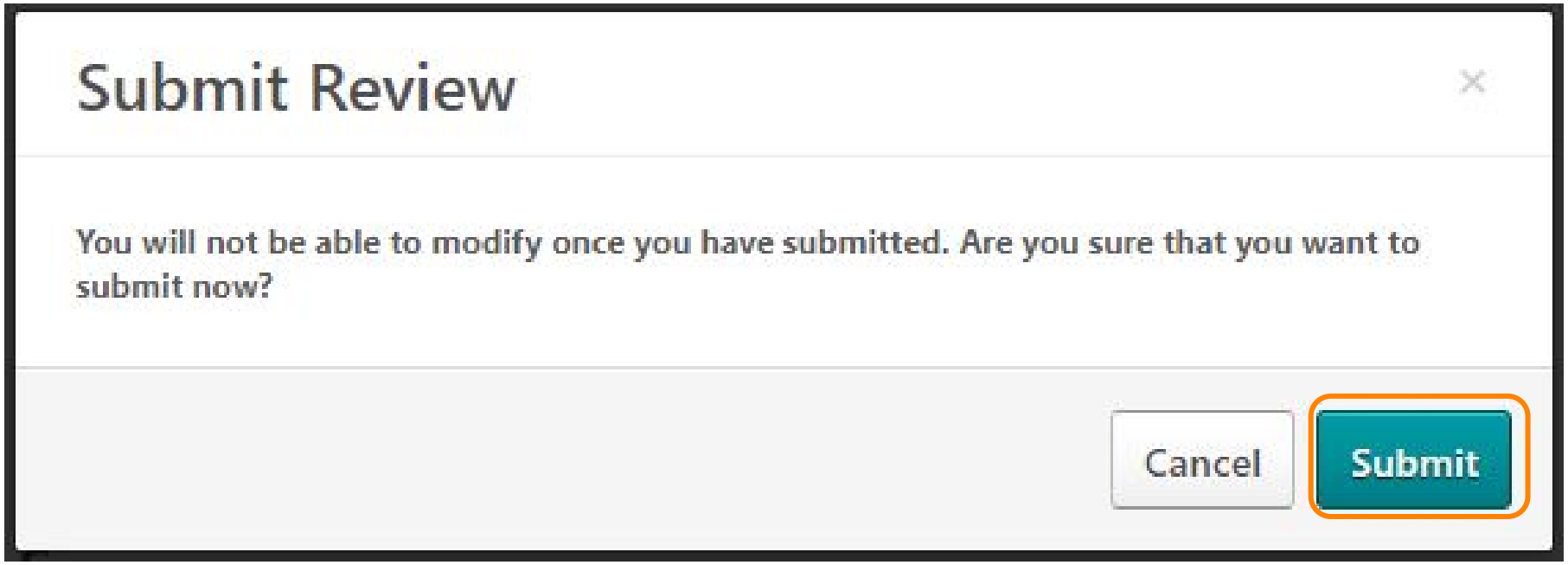
Submit Review



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Questions

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Your PeopleX Team is here to support you!

We support the departments that fall under each CDR listed below.

DEBORAH JOHNSON	STEFANIE RAMUNDO	KIERSTIN MCLAUGHLIN	MONICA RIVERS
Colin Smith Cat Reese Paul VanderMarck David Delaney Victor dos Santos	Tammy Nelson Brooks Clark	Colin Smith Craig Bissell	Tom Wixted

Thank you!