



2021 Self Reviews

OCTOBER 2021

PRESENTED BY YOUR PEOPLEX PARTNERS



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.*

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

Key Dates



Key Dates

November 1-12
Employees complete a
self-evaluation

November 15-23
Manager completes
employee evaluation

January 4-31
Manager delivers
performance
evaluation and
employee signs off

Jan 6 – Feb 4
Employee completes
2022 objectives

February 4-18
Manager & Employee
sign-off on 2022
objectives

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

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.

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

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

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**

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..? |

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.

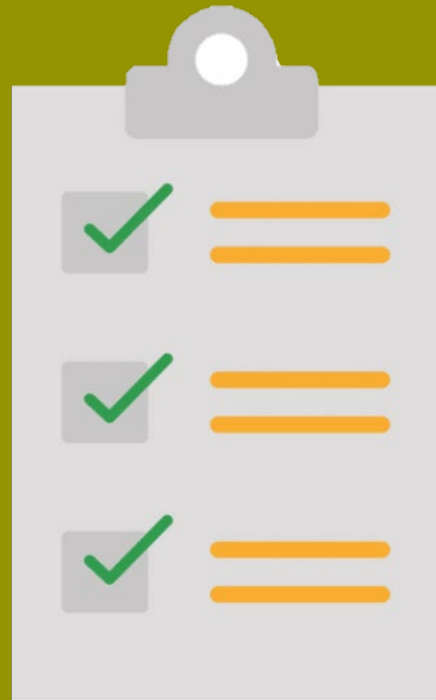
Examples – 2 Developing Effectiveness



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.


Complete your Self-Review




Log into the Performance Hub

MENU

Kierstin McLaughlin ▾

CONFLUENCE

PERFORMANCE MANAGEMENT HUB

Please go to the [United Healthcare](#) website to check eligibility. You can also get additional information by going to the [PeopleOps Benefits & Wellness Confluence Page](#).

Finding the Year-End Self Review



Selecting the Performance Task

Performance Review Summary - Don Try

Launch Review

My Assigned Reviews

My Personal Reviews

Title:

Q

Search

☐ Show completed and expired tasks

| Title | Description | Status | Start Date | Due Date |
|---|---|-------------|------------|------------|
| <div><div></div>Complete 2021 Year-End Performance Self Appraisal</div> | 2021 Year-End Performance Appraisal -v3.3 | In Progress | 10/25/2021 | 11/12/2021 |
| <div><div></div>Create 2022 Goals & Competencies</div> | 2022 Goal & Competency Planning Task v1.1 | Not Started | 10/18/2021 | 2/4/2022 |



Year-End Appraisal – Getting Started

2021 Year-End Performance Appraisal - v3.3

Options ▾

Don Try
Acct Payable Assistant
1/1/2021 - 12/31/2021

0%

Overview

The annual performance appraisal is an opportunity to foster authentic connections between managers and employees. It provides an opportunity for employees and managers to assess the employee's achievements and challenges against established goals. The process relies on trust, communication, and commitment from all participants.

A thorough performance appraisal gives the company critical insight into training that is needed, allows us to identify future leaders and bench strength, and provides our most valuable resource, our employees, the feedback they need to build their careers with SageSure. It is a holistic and specific look at past, present, and future of each employee.

Review Step Progression

- Self Review Due: 11/12/2021
- Manager Review
- HRBP Review
- MGR Sign-Off
- EE Sign-Off

Get Started

Rating & Comments

Overview

Business Objectives

Behavioral Objectives

Peer Review References

Overall Comments

Summary

Sign-Off

Business Objectives

Using the rating scale below, assess 2021 performance against the objectives listed below. Highlight accomplishments and acknowledge the challenges. Use this section to provide specific examples of achievements and roadblocks.

Improve Current Reports

Improve the current reporting process by automating reports for each department. Adhere to the reporting schedule by sending 10 reports daily to business leaders.

Progress: 89%

Status: In Flight

Start Date: 1/1/2021

Due Date: 12/31/2021

more...

Select

?

Comments:

B I U S x₂ x² I_x

¶ ☰ ☲ ☳ ☴ ☵ ☶ ☷

Font Size A-

ABC ↵ ↶ ↷ ✂ 📄 🗑 📎 📧 📧

Back Save and Exit Save and Continue

Rating

Overview

Business Objectives

Behavioral Objectives

Peer Review References

Overall Comments

Summary

Sign-Off

Business Objectives

Using the rating scale below, assess 2021 performance against the objectives listed below. Highlight accomplishments and acknowledge the challenges. Use this section to provide specific examples of achievements and roadblocks.

Improve Current Reports

Improve the current reporting process by automating reports for each department. Adhere to the reporting schedule by sending 10 reports daily to business leaders.

Progress:

89%

Status: In Flight

Start Date: 1/1/2021

Due Date: 12/31/2021

more...

Select

✓ Select

Not Applicable

5 - Exceptional

4 - Highly Effective

3 - Effective

2 - Developing Effectiveness

1 - Not Effective

Back

Save and Exit

Save and Continue

Rating

Rating Scale

| Rating | Description |
|------------------------------|--|
| Not Applicable | Employee is too new to appropriately rate, or business priorities have changed. |
| 5 - Exceptional | Employee serves as a role model, considerably and consistently surpassing all performance standards. |
| 4 - Highly Effective | Employee surpasses most performance standards. |
| 3 - Effective | Employee meets all or most performance standards. |
| 2 - Developing Effectiveness | Employee meets minimal performance standards but requires development or improvement in other standards. |
| 1 - Not Effective | Employee is not meeting expected performance standards and must demonstrate immediate improvement. |

Close

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..? |

Rating & Comments

Overview

Business Objectives

Behavioral Objectives

Peer Review References

Overall Comments

Summary

Sign-Off

Business Objectives

Using the rating scale below, assess 2021 performance against the objectives listed below. Highlight accomplishments and acknowledge the challenges. Use this section to provide specific examples of achievements and roadblocks.

Improve Current Reports

Improve the current reporting process by automating reports for each department. Adhere to the reporting schedule by sending 10 reports daily to business leaders.

Progress: 89%

Status: In Flight

Start Date: 1/1/2021

Due Date: 12/31/2021

[more...](#)

Select ? *

Comments:

B **I** **U** **S** **x₂** **x²** **I_x**

Font

Size

A

A

ABC


Back

Save and Exit

Save and Continue

26

The contents of this document are proprietary and confidential. No part of the document may be disclosed to a third party, or used for any other purposes, without the prior written consent of SageSure Insurance Managers, LLC.

 SageSure

Rating & Comments

Overview

Business Objectives

Behavioral Objectives

Peer Review References

Overall Comments

Summary

Sign-Off

Behavioral Objectives

Using the rating scale below, assess 2021 performance against the objectives listed below. Highlight accomplishments and acknowledge the challenges. Use this section to provide specific examples of achievements and roadblocks.

Written Communication

Progress: 92%

Status: In Flight

Start Date: 6/7/2021

Due Date: 12/31/2021

more...

Select ?

Comments:

B

I

U

S

x₂

x²

I_x

≡

≡

≡

≡

≡

≡

≡

≡

Font

Size

A

A

ABC

↶

↷

✂

📄

📁

📁

📁

📁

Back

Save and Exit

Save and Continue

Peer Review

Overview

Business Objectives

Behavioral Objectives

Peer Review References

Overall Comments

Summary

Sign-Off

Don Try

Acct Payable Assistant

1/1/2021 - 12/31/2021

50%

Peer Review References

In this box, please provide your manager with the names of three (3) peers or colleagues who can provide an informal assessment of your performance in 2021.

Three (3) Peer References

Comments: *

B I U S x₂ x² I_x

¶ ¶ ¶ ¶ ¶ ¶ ¶ ¶

Font Size A A

ABC

↶ ↷

✂

📄

📁

📧

📧

📧

📧


Back

Save and Exit

Save and Continue

28

The contents of this document are proprietary and confidential. No part of the document may be disclosed to a third party, or used for any other purposes, without the prior written consent of SageSure Insurance Managers, LLC.

 SageSure

Overall Comments

Overview

Business Objectives

Behavioral Objectives

Peer Review References

Overall Comments

Summary

Sign-Off

Don Try

Acct Payable Assistant

1/1/2021 - 12/31/2021

75%

Overall Comments

Use this section to further elaborate on your achievements and challenges. Focus on any achievements that may not have been identified as an objective or goal at the beginning of 2021.

Overall Comments

Comments:

B

I

U

S

x₂

x²

I_x

≡

≡

≡

≡

≡

≡

Font

Size

A

A

ABC

←

→

✂

📄

📄

📄

📄

📄

📄

Back


Save and Exit

Save and Continue


Submit


29


The contents of this document are proprietary and confidential. No part of the document may be disclosed to a third party, or used for any other purposes, without the prior written consent of SageSure Insurance Managers, LLC.





Summary


 Overview


 Business Objectives


 Behavioral Objectives

 Peer Review References

 Overall Comments

 Summary

 Sign-Off




Don Try

Acct Payable Assistant

1/1/2021 - 12/31/2021

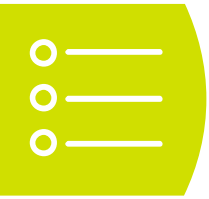
100%

Summary

| | Self Review | Manager Review |
|--|--|----------------|
| Business Objectives | 4.0/5.0 4 - Highly Effective | - |
| Behavioral Objectives | 5.0/5.0 5 - Exceptional | - |
| Peer Review References | N/A | - |
| Overall Comments | N/A | - |
| Company Values | - | - |
| Overall  | 4.5/5.0 4 - Highly Effective | |

Back

Submit



Submit Review

Submit Review

×

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel





Submit

Questions



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!