



Feb 2024

Team Member: Nathan Stuart

Leader: Amy Ellias

Your Topics:

Your topics should be discussion points to help build meaningful relationships and identify experiences that would best support your development. How can your leader better assist you? What went well this month? What could have gone better?

Topic 1: **General questions. I am creating a list of a few things I would like clarification on; general in nature, logistical related, etc.**

Topic 2: **General discussion encompassing (but not limited to) life at UWM, processes, procedures, expectations of not only group / team but also UWM from both team member perspective and company perspective**

Topic 3: **In-line with the above two but discuss leader expectations of me**

Your Goals:

We know there is a higher level of accountability and execution if you write down your goals. Your leader wants to help you achieve and exceed your goals both professionally and personally. Please share the goals you would like to continue to work on and track progress of.

Goal 1: **Continue to acclimate to UWM culture (learning the "The Way of the Warrior", etc.)**

Goal 2: **Continue to learn position specific responsibilities, acclimate to team, etc.**

Goal 3: **(Continue to) Fine-tune my acclamation of merging personal & professional routines (e.g., family morning schedules before heading to UWM, etc.)**

Goal 4: **Work through house & home "spring things" (e.g., bi-annual household chores)**

How We Do It:

At United Wholesale Mortgage our team members are self-motivated individuals, striving for excellence through collaboration and innovation.

1 . Positive Attitude: Strength Past 12 Months: 1 Strengths, 0 Opportunities

You have been amazing while we work through the various access tickets/permissions to get you into the tech stack. By remaining positive and documenting the impediments you faced, we will be able to research, review, and improve the process. Thank you and I'm looking forward to seeing you "unleashed" in the technology

2 . Coachable: Opportunity Past 12 Months: 0 Strengths, 1 Opportunities

As you are new to UWM and to the Team, you done a great job of reviewing the documentation and asking lots of questions. This shows you are self starting and hungry to learn our tech, which excites the Team to have an experienced quality focused Team Member. Your opportunity is to keep searching, reading/reviewing, and scheduling those shadow/knowledge transfer sessions with #sc, KLD, and BOLT

3 . Work Ethic: None Past 12 Months: 0 Strengths, 0 Opportunities

4 . Team Player: None Past 12 Months: 0 Strengths, 0 Opportunities

5 . Driven: Strength Past 12 Months: 1 Strengths, 0 Opportunities

Tying into your Positive Attitude strength, once you hit the floor to dig in and learn our tech and understand the big picture has been AWESOME! By being Driven, you are already setting yourself and our Products up for success as PowerBI/the data is where DocsAI will dig/research to find those areas of improvement. Great Job and keep up this HWDI!

6 . Ownership: None Past 12 Months: 0 Strengths, 0 Opportunities

FOCUS AREA: None

May include discussion topics such as: other comments on attributes, overall performance metrics, or production goals.

None

Leader Comments:

Comments regarding your monthly talk with your Team Member are optional. If adding comments, please do so before sharing the form.

None

Team Member Comments:

Comments regarding your monthly talk with your leader are optional. If adding comments, please do so before submitting the final acknowledgement.

I'm in full agreement regarding the opportunity and will continue to work toward that goal / continue growing. I feel leader provides a great balance of direction, input, and oversight while also allowing me to self-motivate, self-direct, and form working relationships with those in and outside of the immediate group (learning to stand on my own, so to speak).

☒ With Data

Shared: 3/19/2024
Accepted: 3/19/2024

PILLAR ESSENTIALS

2/01/24 - 2/29/24

Kudos Given People		
Feb 2024	Jan 2024	Goal
0	0	2

UZone Task Success Service		
Feb 2024	Jan 2024	Goal
100.00%	-	98.00%

YourTime Submission Streak Relationship Driven	
YourTime topics should be submitted by the 8th of every month.	
Streak	Last Submitted
1	01/01/1900

Timecard Success Thumb Pointers		
We aim to have no tardies or missed lunches.		
Feb 2024	Jan 2024	Goal
100.00%	-	100.00%

Training Hours Continuous Improvement		
Feb 2024	Jan 2024	Goal
64.79	-	2

UZone Comments & Posts Fun & Friendship		
Feb 2024	Jan 2024	Goal
0	0	4