YOURTIME
May 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 status / state of things - projects, group, vertical, company, life, universe, and everything - PTO allotment**

Topic 2:   **Data Analysis Expressions (DAX) resources (specifically training)**

Topic 3:

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 learn position specific responsibilities, acclimate to team, etc.**

Goal 2:   **Become more comfortable and confident with specifically (Power BI's) DAX language**

Goal 3:   **Continually grow in Power BI with goal being becoming "decent" (comfortable) at it (goal there after will be to become "proficient"); soft to medium metrics available upon request**

Goal 4:

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: None   Past 12 Months: 2 Strengths, 0 Opportunities

2 . Coachable: None   Past 12 Months: 0 Strengths, 2 Opportunities

3 . Work Ethic: Strength   Past 12 Months: 2 Strengths, 0 Opportunities

Even though you encountered several impediments and issues while working on the MUCH needed ETL for the Document Reporting PowerBI data, that didn't deter you from finding ways to provide value to the Team. Whether it was carving out time to grow your knowledge through trainings/videos or by spending time with individuals and squads to teach and solution, you are an amazing Team Player. Keep being amazing in this HWDI :)

4 . Team Player: Opportunity   Past 12 Months: 0 Strengths, 2 Opportunities

Each month you excel in this HWDI, so it is always a challenge for me to think of opportunities for you. For May, the unfortunate theme appears to be the continuation of access/permission roadblocks, so your opportunity is to set up some for us to review your current documentation of your journey and write out a plan to work with the access management teams to significantly improve the process

5 . Driven: Strength   Past 12 Months: 2 Strengths, 0 Opportunities

Tying into your HWDI strength of Work Ethic, your drive helps propel both the Team and Work in a forward direction. The research, tickets, conversations, and escalations required to work through each impediment that was thrown in front of you is an incredible attribute and spotlights you as a shining example of how to not give up. Keep shining!

6 . Ownership: None   Past 12 Months: 2 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 have reviewed the above with team lead and am in full agreement.

Shared: 6/17/2024
Accepted: 6/17/2024

🔵 With Data

PILLAR ESSENTIALS   5/01/24 - 5/31/24

Kudos Given
People

May 2024	Apr 2024	Goal
0	0	2

UZone Task Success
Service

May 2024	Apr 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
4	04/30/2024

Timecard Success
Thumb Pointers

We aim to have no tardies or missed lunches.

May 2024	Apr 2024	Goal
100.00%	100.00%	100.00%

Training Hours
Continuous Improvement

May 2024	Apr 2024	Goal
3.66	6.57	2

UZone Comments & Posts
Fun & Friendship

May 2024	Apr 2024	Goal
0	0	4