



Mar 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 Observability group review (progress to-date, workflows, procedures, tweaks, etc.) both high-level and my involvement specific**

Topic 2: **Review, to ensure, my direction of responsibilities (as it applies to role in Observability group), action plans, etc. are in line with leadership's expectations, direction, etc.**

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: **Acclimate to new Observability group (practices, procedures, etc.)**

Goal 3: **Perform a BOLT shadow (paused until goal #02 above is either achieved or otherwise well on its way to being achieved - current ETA is a few weeks out)**

Goal 4: **Increase momentum with regarding to compartmentalizing the action plan, direction, as well as overall Power BI environment (too few char's here to explain further - we'll talk)**

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: 1 Strengths, 0 Opportunities

2 . Coachable: None Past 12 Months: 0 Strengths, 1 Opportunities

3 . Work Ethic: Strength Past 12 Months: 1 Strengths, 0 Opportunities

Your ability to stay on task and make progress, despite the multitude of impediments, is amazing! By being focused on getting into the PowerBI code and gaining an understanding of the code by starting to backwards engineer the data, you are getting us back on track of having clean reporting data. Amazing amazing amazing and keep this up!

4 . Team Player: Opportunity Past 12 Months: 0 Strengths, 1 Opportunities

The amount of care and effort you have poured into the PowerBI work has given the Team the "light at the end" of our VERY manual process of comparing Live v Static data. By having a thorough understanding of where the data is stored, how changes are returned, and documenting this in KB, we are providing visibility and transparency into the work. Your opportunity is to keep adding to existing/new KB pages to ensure we have some high level documentation around your processes/findings/ideas

5 . Driven: None Past 12 Months: 1 Strengths, 0 Opportunities

6 . Ownership: Strength Past 12 Months: 1 Strengths, 0 Opportunities

Tying into your first strength, you've been amazing as we worked through the correct access rights and lack of an actual backlog By finding ways and then working around your impediments allowed you to dig in and work through the PowerBI data AND document the journey to clear those impediments, you've ensured we have a better understanding of those access permissions for future Team Members. Keep up this strength!!!!

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.

No concerns with leader's comments; good discussion with leader during YourTime; in agreement with leader's thoughts on opportunity

☒ With Data

Shared: 4/19/2024
Accepted: 4/19/2024

PILLAR ESSENTIALS3/01/24 - 3/31/24

Kudos Given People		
Mar 2024	Feb 2024	Goal
0	0	2

UZone Task Success Service		
Mar 2024	Feb 2024	Goal
100.00%	100.00%	98.00%

YourTime Submission Streak Relationship Driven	
YourTime topics should be submitted by the 8th of every month.	
Streak	Last Submitted
2	03/01/2024

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

Training Hours Continuous Improvement		
Mar 2024	Feb 2024	Goal
14.02	64.79	2

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