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2020 Year-End Performance Review

Review Period 1/1/2020 - 12/31/2020

REVIEWER

George Baker III (Manager), Christopher Legros (Manager - Co-Planner), Christopher Legros (Indirect Manager), Stephanie Sansone (HR Business Partner)

Ryan Klauder

Manager, BI
Job Code

iCIMS®

Overview

Task Instructions

The year-end performance review provides an opportunity for managers and employees to reflect on performance over the past year and evaluate achievement of departmental objectives. To provide multi-faceted feedback, the review consists of a self-assessment and a management assessment which incorporates the themes received via multi-rater feedback.

The review is intended to frame the of performance from January 1, 2020 through December 31, 2020. Please follow each of the steps listed below to complete the 2020 Year-end Performance Review.

Objectives

Directions

Please select the rating that best indicates how well you feel each objective has been accomplished. Additionally, please provide feedback for each objective (i.e. examples that support your rating). Lastly, please provide commentary in the overall objective comments box that summarize the ratings that you selected.

Rating Scale

Rating	Description
Always Exceeds Expectations	Delivered unique and exceptional results in ALL aspects of job responsibility. Contributions had a significant and quantifiable impact on the Team/Department/Organization's goals (as applicable to the position level). Continuously demonstrated a high degree of initiative/extra effort. Exemplifies the highest of competencies and skills for the position level.
Exceeds Expectations	Consistently met expectations and delivered significant and noteworthy results in SOME aspects of job responsibility. Contributions had a considerable impact on the Team/Department/Organization's goals (as applicable to the position level). Demonstrated initiative/extra effort towards many goals. Demonstrated excellence in most competencies and skills for the position.
Meets Expectations	Delivered effective and reliable results in all areas of job responsibility. Positively contributed to the team's goals. Demonstrated initiative/extra effort towards some goals. Demonstrated proficiency in most competencies and the skills required for the position.
Sometimes Meets Expectations	Delivered inconsistent results in some areas of job responsibility. Improvement is needed to bring performance to the level of contribution required for the role. Requires development that may include the benefit of experience, training and/orcoaching with regard to achieving results and/or demonstrating proficiencies in competencies.
Regularly Fails to Meet Expectations	Delivered minimal or no results in key areas of job responsibility. Contributions toward organizational results and/or proficiency of competencies for the position are unsatisfactory. Immediate improvement is required to bring performance to an acceptable level.

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Partnerships

- Business Partnering/Customer Satisfaction (develop a relationship that works!)
- Initiative (willingness to be proactive and present)
- Project Management (ability to own a project from start to finish)

Start Date	**Due Date**	**Status**
5/17/2020	12/31/2020	On Track

Progress	**Weight**
0%	30%

Reviewer	Rating	Weight
Ryan Klauder (Self)	Always Exceeds Expectations	30%
Christopher Legros (Manager - Co-Planner)	Exceeds Expectations	30%

Comments

Ryan Klauder (Self):

- This year I grew my business partnering/customer service. When I first started I was really tasked with supporting mostly Talent analytics requests and Finance headcount. From my effort to automate, I was able to branch out into Sales with Mike, PMO with Karen, iRIS/Platform Engineering with Niru, Legal with Courtney, Accounting with Mike and Infosec with Doug. I believe I've received positive reviews from all of these partners and customers because I constantly work to provide them meaningful analytics. Partners now directly tap me to support telling their stories.
- This year was extremely dynamic but I tried to step back and strategically think about increasing productivity and enhancing output behind the scenes. This initiative was the reason why I volunteered to be the Product Owner for iRIS (drastically improving the productivity and capabilities of analytics), began Sprint Planning with the BI Team (improving visibility of work and planning), and began putting in place processes/environments for collaboration (MS Teams Channels, Sharepoint environments, Tableau Online setup). I also took the initiative to build out many new dashboards for lines of business that previously did not have analytical support and stepped in to support existing customers with new requests.
- This year I took on a lot of new analytics projects that I owned from Start to Finish (as listed below) but the one I am most proud of is supporting the build out of the BI Team. While we had a vision and began hiring, I started to prioritize management of deliverables with our backlog, putting together an executable roadmap for the team. I feel this clearly demonstrates my project management ability and initiative. Some of the projects I executed on below:
  - Deal Desk Analysis
  - Compensation Distribution Dashboard
  - CCAT Funnel
  - Span of Control Analysis
  - Stage Funnel
  - Legal Contracts dashboard
  - Exception Reports
  - Infosec Dashboards

Christopher Legros (Manager - Co-Planner):

Ryan has continued work hard and produce results above and beyond expectations in all areas that he gets involved in. He is requested to work on particular tasks and has developed a brand for very high quality work. His approach to stepping in and developing processes around iRIS from the ground up and oversight into this new and important system was very well received within the team and ISS.
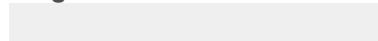
Projects & Focus of Work

Start Date
5/17/2020

Due Date
12/31/2020

Status
On Track

Progress
0%

Weight
35%

Reviewer	Rating	Weight
Ryan Klauder (Self)	Exceeds Expectations	35%
Christopher Legros (Manager - Co-Planner)	Exceeds Expectations	35%

Comments

Ryan Klauder (Self):

I am always dedicated to seeing projects through and ensuring to focus my work on delivering value. I believe the above comments demonstrate my ability to execute, manage and focus my work. More specifically I even received positive reviews from Steve for the CCAT Funnel Analysis I performed which fully demonstrates my projects and focus of work.

Christopher Legros (Manager - Co-Planner):

Ryan has worked to automate a lot of this reporting and dashboards, which provides him the opportunity to expand into more technically challenging areas around advanced analytics. Continuing to deliver around the value he's created and expanding that to other areas will be an important milestone for him in his growth within iCIMS.

Systems & Technical Skills

- Process Improvement (data source design and Tableau Online publication)
- Salesforce Knowledge (solid understanding of available tables, fields and functionality)
- Tableau Acumen (best practices for formulas, parameters and visualization)
- Excel Acumen (best practices for data clean-up, formulas, pivot tables and queries)
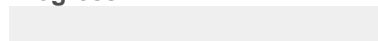
Start Date
5/17/2020

Due Date
12/31/2020

Status
On Track

Progress
0%

Weight
30%

Reviewer	Rating	Weight
Ryan Klauder (Self)	Always Exceeds Expectations	30%
Christopher Legros (Manager - Co-Planner)	Exceeds Expectations	30%

Comments

Ryan Klauder (Self):

- I have continuously initiated process improvements for iRIS and Tableau Online throughout the year. With every new object, system or source we are capturing, I have been a pseudo data architect with Platform Engineering providing my thoughts on how designs can support analytics. I have worked very closely with Platform Engineering and GTM Analytics on ensuring that our data lake/warehouse meets the needs of the business.
- I have a decent conceptual-level understanding of Salesforce functionality, fields and objects. I've also aided in exporting schema listers that provides us with a map of all the fields in SFDC as well as building in-product queries to support our data pipelines. However our SFDC has a lot of complexity and nuances that I will need to further understand and become a SME at. This is one improvement area that I am looking to take on in 2021.
- I am seen has a technical expert and SME for Tableau within the company, and more specifically within GTM Analytics and Business Intelligence. I have provided technical guidance and thought leadership to Chris Motto, Pat Masur, Craig Labulis, Vincent Lawton, Nick Emery, Maitri Suratia, and Danielle/Jason before they left. I have constantly shared my thoughts, formulas, and innovative solutions with the team both through a Tableau Tips and Tricks email newsletter and the iRIS Users Group channel.
- I already possess expert Excel acumen and have supported some excel initiatives (Data Governance Exception Report in Excel, Legacy Talent Metrics Data, etc). However this skillset is no longer applicable for the next-gen analytics environment we are driving towards.

Christopher Legros (Manager - Co-Planner):
See above for technical capabilities. Tableau Online and iRIS have take n many leaps forward in 2020 and will continue to do so with Ryan's drive to deliver high quality analyses.

Talent Development 2020

Increase functional knowledge and engage in professional development by participating in a variety of different learning and development opportunities, applying that knowledge to your role and career aspirations.

Work with your manager to determine the appropriate amount of learning based upon your role, level and tenure in the organization – track in the Learning portion of Cornerstone.

As suggested, a guide of 32 hours of personal and professional development per year can be used, however this may fluctuate based upon level and role within the organization.

Start Date	**Due Date**	**Status**
2/26/2020	12/31/2020	On Track

Progress

0%

Weight
5%

Reviewer	Rating	Weight
Ryan Klauder (Self)	Exceeds Expectations	5%
Christopher Legros (Manager - Co-Planner)	Meets Expectations	5%

Comments

Ryan Klauder (Self):

I am always a continuous learner and this year was no exception. For the request of the Attrition Model from Talent I extensively researched online and throughout my network for the ML technical acumen to build the initial model. Additionally, I've taken formal classes on ML, SQL Server, and Tableau Data Viz through LinkedIn throughout the year. To further develop my soft skills, I also aided in the training of New Hires for Tableau, Tableau Online, iRIS, and general onboarding experiences.

Christopher Legros (Manager - Co-Planner):

Ryan's technical capabilities and project management skills have positioned him well for his future within iCIMS.

Competencies

Directions

Please select the rating that best indicates your demonstration of each core competency. After ratings are selected, you will be able to provide feedback in the Overall Competency Comments section to support the ratings selected.

Rating Scale

Rating	Description
Role Model	Role Model
Consistently Demonstrates	Consistently Demonstrates
Demonstrates	Demonstrates
Sometimes Demonstrates	Sometimes Demonstrates
Does Not Demonstrate	Does Not Demonstrate

Accountability

We own outcomes for customers and colleagues

Reviewer	Rating
Ryan Klauder (Self)	Role Model
Christopher Legros (Manager - Co-Planner)	Consistently Demonstrates

Adaptability

A capacity to embrace change with a positive, team-oriented attitude toward results.

Reviewer	Rating
Ryan Klauder (Self)	Consistently Demonstrates
Christopher Legros (Manager - Co-Planner)	Demonstrates

Customer Commitment

The ability to deliver a "customer" experience second to none, balances what's right for one's customers with the productive use of resources.

Reviewer	Rating
Ryan Klauder (Self)	Role Model
Christopher Legros (Manager - Co-Planner)	Consistently Demonstrates

Drive

Confidence, backed by an internal will to take ownership and initiative to overcome obstacles and deliver results.

Reviewer	Rating
Ryan Klauder (Self)	Role Model
Christopher Legros (Manager - Co-Planner)	Consistently Demonstrates

Empathy

Ability to put yourself in someone's position and understand their concerns and motivations.

Reviewer	Rating
Ryan Klauder (Self)	Consistently Demonstrates
Christopher Legros (Manager - Co-Planner)	Consistently Demonstrates

Kaizen

An aptitude for continuous improvement, presenting new ideas and executing upon them to achieve results and improve processes and systems.

Reviewer	Rating
Ryan Klauder (Self)	Role Model
Christopher Legros (Manager - Co-Planner)	Consistently Demonstrates

Passion

An unrelenting enthusiasm linked to belief in our vision, mission and/or philosophies of the company.

Reviewer	Rating
Ryan Klauder (Self)	Consistently Demonstrates
Christopher Legros (Manager - Co-Planner)	Consistently Demonstrates

Transparency

Tell it how it is, through honest communication, building trust and fostering alignment, while respecting confidences & privacy.

Reviewer	Rating
Ryan Klauder (Self)	Consistently Demonstrates
Christopher Legros (Manager - Co-Planner)	Consistently Demonstrates

Competency Comments & Summary

Overall competency comments and summary:

Comments
Ryan Klauder (Self): This year has been dynamic but exciting. I am proud of what we've been able to accomplish this year with a small team but remain ambitious and enthusiastic about the future. I look forward to fostering a closer partnership with the business to take our corporate analytics function to the next level. **Christopher Legros** (Manager - Co-Planner): Ryan's contributions have been seen throughout the company and at many different levels. I look forward to his continued growth and adding more responsibility in 2021 and beyond.

Key Strengths and Focus Areas

Key Strengths

Comments
Christopher Legros (Manager - Co-Planner): Attention to detail, process oriented and overall advanced approach to analytics

Key Focus Areas

Comments

Christopher Legros (Manager - Co-Planner):
Being more flexible and reprioritizing.

Sign Off & Comments

Directions

Please sign off.

X Ryan Klauder
Self

3/8/2021
Date

X Chris Legros
2nd Level Manager

1/25/2021
Date

X Chris Legros
Manager

2/26/2021
Date

X Stephanie Sansone
HR Business Partner

2/17/2021
Date

Competencies

Directions

Please select the rating that you feel best indicates how each Competency was demonstrated. Additionally, please provide feedback in the Overall Competency Comments box on the next page to summarize and support the rating scores you selected

Rating Scale

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Role Model	Role Model
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Sometimes Demonstrates	Sometimes Demonstrates
Does Not Demonstrate	Does Not Demonstrate

Adaptability

A capacity to embrace change with a positive, team-oriented attitude toward results.

Customer Commitment

The ability to deliver a "customer" experience second to none, balances what's right for one's customers with the productive use of resources.

Drive

Confidence, backed by an internal will to take ownership and initiative to overcome obstacles and deliver results.

Empathy

Ability to put yourself in someone's position and understand their concerns and motivations.

Kaizen

An aptitude for continuous improvement, presenting new ideas and executing upon them to achieve results and improve processes and systems.

Passion

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Transparency

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Competency Comments

Rating Scale

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Overall Competency Comments

Summary

Overall Rating

2020 Year-End Performance Review
Ryan Klauder

Exceeds Expectations

Final Manager Sign Off

Directions

Please sign off that you have reviewed your employee's final comments.

X G Baker
Manager

3/8/2021
Date