



## Manager Self Evaluation & Review

Name:

Position Title:

Date:

\_\_\_\_ Evaluation      \_\_\_\_ Self-Evaluation      \_\_\_\_ Review

- 1. Vision.** Has a compelling vision for their office or department and where it should be in a year; in 5 years. Has a "big picture" perspective that identifies opportunities and threats. Understands how their office/department fits into the company vision.

Score (1-10): \_\_\_\_    Comments:

- 2. Communication.** Ability to communicate the vision and inspire others to "shared vision". Communicates well with the President, other Managers, Sales Partners & Staff. Supports the overall company vision and their role in it.

Score (1-10): \_\_\_\_    Comments:

- 3. Goals.** Ability to clearly articulate goals and responsibilities that will move their office/department toward the vision. (See "Goals" attached.)

Score (1-10): \_\_\_\_    Comments:



4. **Focus/Delegation/Management Skills.** Ability to focus attention on the “critical few” area/projects that require their leadership. Ability to delegate effectively and accomplish goals through others. (List top three “critical few”.)

Score (1-10): \_\_\_\_ Comments:

5. **Passion/Commitment.** Enthusiasm and dedication to the company and the position.

Score: (1-10): \_\_\_\_ Comments:

6. **People.** Ability to attract and keep great people. Ability to get the right people in the right positions. Ability to recruit, train, and retain a top quality staff that works together as a team. Commitment to helping people grow. A “star builder”.

Score (1-10): \_\_\_\_ Comments:

7. **“Star Builder”.** Has a career development plan for each person in their office/department.

Score (1-10): \_\_\_\_ Comments:

8. **Connected.** Is connected to their people. Knows their people’s goals, strengths, and weaknesses. Has meaningful interaction with each person in their office/department at least weekly. Their people think of them first when they have a question or idea.

Score (1-10): \_\_\_\_ Comments:



- 9. Availability.** Is readily available to the people in their office/department. Maintains “office hours”. If out of the office, receptionist is trained to tell people where they are and when they will be back. Manages by “walking around”.

Score (1-10): \_\_\_\_ Comments:

- 10. Facilities.** Maintains their office/department in a neat orderly fashion that inspires confidence that they are organized and “in control”. Office facilities are neat, clean, freshly painted and updated to inspire an “environment of success”. Paper and supplies are organized and easily available (a place for everything and everything in its place) so it’s “easy” to do business.

Score (1-10): \_\_\_\_ Comments:

- 11. Control/Responsibilities.** Take control and responsibility for their office/department. Knows when to ask others for advice or help but never expects others to do their job. Knows how to make decisions “apart” from the other Managers and yet knows how to stay connected and be “a part” of the company (interdependence” versus “independence” or “dependence”). Supports the concept of the “family company”.

Score (1-10): \_\_\_\_ Comments:

- 12. Systems.** Ability to create, operate, and maintain systems that add value and make it “easier” for sales partners and customers to “do business.” Uses “checklist” system.

Score (1-10): \_\_\_\_ Comments:



- 13. Customer Service Rating.** Establishes systems, training, and measurements to have a “customer friendly” environment that delivers “world class service”. Communicates with builder accounts under their responsibility at least every 60 days. Maintains a customer survey rating 4.5 or better in all categories for their office.

Score (1-10): \_\_\_\_ Comments:

- 14. Knowledge/Competence/Learning.** Has the knowledge base to be effective in the position. Knows how to do every job in their office/department. Is continuously seeking new knowledge and ways to improve and make the organization better. Creates a “learning environment” in their office/department.

Score (1-10): \_\_\_\_ Comments:

- 15. Business Generator.** Continuously looking for a new builder, investor, referral, and relocation accounts and ways to help sales associates bring business into the company.

Score (1-10): \_\_\_\_ Comments:

- 16. Change.** Ability to anticipate and lead change.

Score (1-10): \_\_\_\_ Comments:

- 17. Trust.** Is trusted to treat people fairly and keep confidence. Has credibility. Is reliable-can be counted on to do what is promised.

Score (1-10): \_\_\_\_ Comments:



**18. Decision Making.** Makes good decisions. Has a system for gathering input and making decisions that is consistent and well understood by the President and people within their office/department.

Score (1-10): \_\_\_\_ Comments:

**19. Positive Attitude/Encourager.** Creates a positive environment that encourages others to succeed.

Score (1-10): \_\_\_\_ Comments:

**20. Strengths.** What specific strengths does the Manager have and how could these strengths be leveraged for greater positive impact within our company?

**21. Weaknesses.** What are specific areas of improvement that would help the Manager be even more effective?



**22. Opportunities/ Threats.** What opportunities and threats do you see that the Manager should address?

**Opportunities:**

**Threats:**

**Additional Comments/Suggestions** (use additional paper if necessary):