



MBA 687 LEADERS SELF EVALUATIONS

Note: Individuals rate their skill levels on the following scale:

Not Skilled | Minimally Skilled | Somewhat Skilled | Skilled | Very Skilled

Title: Vice President

Job Summary

Leads departments and operations for an entire organization and creates its overall vision, mission, values, beliefs, and strategic goals. Directs and evaluates other executive leaders' work and the success of the organization. Maintains awareness of external and internal competitive landscapes, opportunities for expansion, customers, markets, and new industry developments and standards. Manages the strategic plan that guides the direction of a team's business and collaboratively works with the executive management team to identify, prioritize, and act upon company needs, focusing on integration strategies to ensure optimal efficiency. This position requires competencies such as analytic and strategic thought, vision, orientation to detail, customer focus, talent management, resource management, and leadership skills.

Vice President Self-Assessment:

As I reflect on this past year, I have driven business expansion from startup and evaluated the organization's success. This past year, we identified ways to increase revenue and decrease costs by 10%. I analyzed financial reports with the accounting manager, prepared new operating budgets, and greenlit pilot projects using AI and chatbots to compete in an increasingly digital economy. My understanding of the external factors affecting the organization will help us think ahead and be ready for changes in the market. My most tremendous success was bridging the gap between the company's day-to-day running and the board of directors' sweeping visions. Since taking on the new role, I realize my leadership skills come from years of experience and knowledge throughout life. This wisdom has impacted my judgments, decisions, and actions. I have learned to focus on a clear purpose and mission. I have consistently shown commitment and motivation since joining the company, and I want us to succeed. I am a leader who focuses on meeting set deadlines and objectives on time. I realize that I can be too controlling in a project, and I don't give other team members enough room to contribute or develop their ideas. I must learn to give others more space and let them take the initiative, too. Maybe I should try harder to promote the company's culture and values within my team. While I regularly hold meetings with this in mind, I should focus on boosting team spirit and collaboration. I am often frustrated, and I find it hard to communicate when faced with other leaders' behaviors. Despite the challenges we faced this past year, I am incredibly proud of what my team and I have accomplished during the past year.

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Leadership Skills					✓
Strategic Thinking Skills					✓
People Management Skills				✓	
Change Management Skills			✓		
Communication Skills				✓	
Ethical Practice					✓
Tech Savvy /Computer Skills				✓	
Fostering Teamwork					✓
Visioning				✓	
Self-Awareness and Emotional Intelligence (EQ)				✓	
Cross-Cultural Awareness			✓		
Learning Agility				✓	

Title: Sales Manager

Job Summary

Leads the sales and marketing functions, including strategic planning, budgeting, forecasting, and maintaining scalable processes that differentiate and highlight the value proposition from concept to execution for all business areas. Drives profitable revenue and market share growth through domestic and international marketing programs to email, print/digital, CMS, and social media platforms. This person is highly collaborative and works cross-functionally to devise campaigns that engage, inform, and motivate to raise brand awareness. Manages and coaches inside sales and outside sales teams.

Sales Manager Self-Assessment:

After taking the time to evaluate my performance, I would like to highlight a few of my best achievements from the past year. At the beginning of the period, I spearheaded the launch of our organization's first sales industry research report. My promotional efforts helped secure a speaking engagement at two national sales conferences, which will help the company meet its annual objective of increasing industry exposure and promoting our customer value proposition. Additionally, I assisted in overhauling our website content with IT and helped procure a new data partner. As a result, our paid search efforts' ROI has increased by 120% year over year and influenced \$6 million in our latest service line sales. Because of this year's marketing strategy's ambitious nature, there were times when I pushed my team hard to perform at their best, put in extra hours, and deliver on highly demanding projects. While I would never compromise on my drive for results, I must take the time to give more thoughtful and considerate feedback to members of my team.

This quarter, I noticed that I could have delegated and communicated strategic goals to our team better. Passing more projects to the outside sales team will help me become more efficient while also providing them more opportunities for skill-building and career development. Additionally, I believe meeting with the VP, call center, and sales team bi-weekly instead of monthly will help improve cross-department communication and ensure marketing campaigns are better aligned with overall company goals.

By the end of next quarter, my goal is to improve my cross-cultural practices by taking an online training session. I've been working more closely with the call center team in the past few months and want to collaborate more effectively to understand and achieve our team goals.

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Fostering Teamwork					✓
Visioning				✓	
Self-Awareness and Emotional Intelligence (EQ)			✓		
Cross-Cultural Awareness			✓		
Learning Agility				✓	

Title: Accounting Manager

Job Summary

Manages accounting functions, including analyzing various accounting functions (A/R, A/P, cost, and accounting) to understand what makes clients profitable, ensures accurate transaction records, evaluates financial processing, and controls transaction processes. Manages sub-ledger agreements (inventory, AR, sales, COGS) to the general ledger and investigates and corrects any variances. This person sets the example of integrity, ensuring monies and assets are protected against unauthorized use or removal and loss due to a criminal act or breach of trust. Works cross-functionally, multitasks, problem solves, thinks of the big picture, and focuses on process improvements to improve efficiency and follow generally accepted accounting principles (GAAP). Coaches accounting associates and works with operating managers to ascertain their need for accounting data.

Accounting Manager Self-Assessment:

After taking the time to evaluate my performance, I would like to highlight a few of my best achievements from the past year. At the beginning of the period, I initiated corrective actions for maintaining accounting records, improving record accuracy by 75%. The accounting team implemented an accounting records maintenance system, replacing the old, inefficient one. I spearheaded our organization's new digital timekeeping system, replacing the outdated process and eliminating "paper" timekeeping. We continuously met audit standards this year, and this is for two years in a row, owing to exceptional account management skills. This quarter, I noticed that I have not been delegating enough work to other team members and have challenges communicating strategic goals to our team. Passing more projects to the accounting team will help me become more efficient while also providing them more opportunities for skill building and career development.

By the end of next quarter, my goal is to streamline the accounting systems by implementing standard operating procedures for each subsystem. It is important not to build silos and understand the big picture and our team goals. I am working on transactional accounting improvement, but I also think a strategic approach is necessary. I have worked closely with the customer success coordinator/team leader, but I would like to address with top leadership the communication breakdown, the top-down approach, and ways to collaborate more frequently. I can offer my professional opinion on where best to align finance and accounting programs to the strategic plan and on building action plans to support overall business success.

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Learning Agility					✓

Title: Customer Success Manager

Job Summary

Manages the customer success function and provides input on strategic customer plans to help identify areas where the company can improve overall service delivery, quality, and excellence. Develops customer relationships that promote retention and loyalty. Creates department policies and procedures that optimize the customer experience. This person has the highest accountability level for call center supervision and performs basic human resource tasks such as hiring and training staff. Coaches the customer success coordinator/team leader in improving service efforts, scoring performance, and developing support strategies based on customer feedback.

Customer Success Manager Self-Assessment:

In the past year as a call center manager for the company, I've increased the customer satisfaction rate by 37% through overseeing day-to-day contact center operations and business planning, employee development, operational efficiency, and service excellence. I worked with the customer success coordinator to revise the existing cold call script and added a stronger value proposition, resulting in an increased call time average. We started interfacing closely with the sales department to ensure alignment and spent a great deal of time "QC-ing" or monitoring queues and tracking inbound call performance. I coached our customer success coordinator on performance metrics, including inbound calls, call waiting, and abandonment rates. We started working on creating a new customer service training manual and quality assurance form. I empowered the customer success coordinator to work with the accounting team on the new timekeeping implementation.

After reflecting on my performance, I noticed that while my ability to build rapport with employees and customers helps me as a manager, I will need to delegate more to the customer success coordinator as the business grows. I began serving as the backup trainer and assisted in onboarding nine new representatives, all of whom finished their first quarter meeting performance standards. Given this experience and my commitment to continued growth, I think there is room for improvement. I want to shift the call center culture to a more employee-centric workplace where our employees are happy, comfortable, and valued. I am aware of the possibility that the various technological advancements in AI voice processing, customer analysis, and chatbots may improve customer satisfaction; however, it could also make some employees redundant. I am unsure if our employees see leadership as approachable and observant or sensitive to what the agent is trying to tell us, even indirectly. If we can fix this, we can improve business performance and reduce turnover.

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Title: Customer Success Coordinator/Team Leader

Job Summary

Provides industry-leading customer care, order assistance, technical customer service, and customer success team leadership while engaging in real-time troubleshooting of inbound Tier II and Tier III customer requests by email and telephone. Coaches employees in all customer service and contract sales facets, manages the customer care escalation chain, and works with the customer success manager to improve overall service delivery improvement, quality, and excellence. This person has a high level of accountability for call monitoring to improve service efforts and scoring performance and develops support strategies based on customer feedback. Works with a knowledge-sharing mindset, works with a sense of urgency, works cross-functionally, is a problem solver, and thinks outside the box while troubleshooting the root cause of all customer success center problems to identify the action(s) required to resolve the customer's issue immediately. Serves as customer success trainer.

Customer Success Coordinator/Team Leader Commentary:

In the past year as lead agent in the call center for the company, I've worked with my manager to increase customer satisfaction rate by 37% through revising the existing cold call script, adding stronger value propositions, and focusing on quality control QC-ing and agent dashboards. I spent time with agents, communicating performance expectations on inbound calls, call waiting, and abandonment rates. I monitored calls using our new quality assurance form. I handled 15–20 customer requests to speak with a supervisor per day and positively resolved the issues. I assisted my manager in 36 employee evaluations, detailing observations of positive performance, opportunities for improvement, and specific details of supervisor calls taken for the week. I demonstrated the ability to handle 50 or more calls a day as the lead customer success agent, too. By decreasing my talk time by 15 seconds per call, I believe I can increase my call-per-hour rate by at least 10% next quarter without negatively impacting customer satisfaction. I also worked with the accounting manager and her team to implement the new digital timekeeping system and train all agents.

After reflecting on my performance, I noticed that while my ability to work with employees at all company levels is one of my best skills, I understand our customers. I am ready to take on more HR-related responsibilities. I began serving as the lead customer success trainer and helped my manager onboard nine new representatives. I would like to understand the call center's company goals and work with my manager to shift the call center culture to a more employee-centric workplace. Many call center workers have been here less than two years (27.5 %), and most call centers run an average 30–45% turnover. Let's focus on retention. I believe that additional sales training and education about our products would help me increase my up-selling performance in line with company expectations. I want to discuss a potential promotion to assistant customer success manager.

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