Partner Performance Self-Assessment

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| **Performance Criteria** | **Rating**  **(?/10)** | **Evidence**  **(…to support the rating I have given)** | **Areas for improvement** | **Goals for next quarter** |
| Profitability on work supervised |  | * Profit on fees managed * Days lock-up * Write-offs * Average fee per client |  |  |
| Client satisfaction on work supervised |  | * Client retention * Client complaints * Client satisfaction index * Fee growth from existing clients * On time performance |  |  |
| Coaching on work supervised |  | * Staff satisfaction index * Staff turnover * Staff complaints |  |  |
| Contributions to practice development |  | * New client work won – new work from existing clients and new clients – in target market. * Specific networking and marketing activities. |  |  |
| Contributions to the success of others  (outside of immediate team) |  | * Mentoring/support given to broader firm. |  |  |
| Personal growth |  | * Specific activities that you have engaged in to develop both your technical and non-technical skills. |  |  |

The performance criteria come from David Maister’s book “Managing the Professional Service Firm”.