

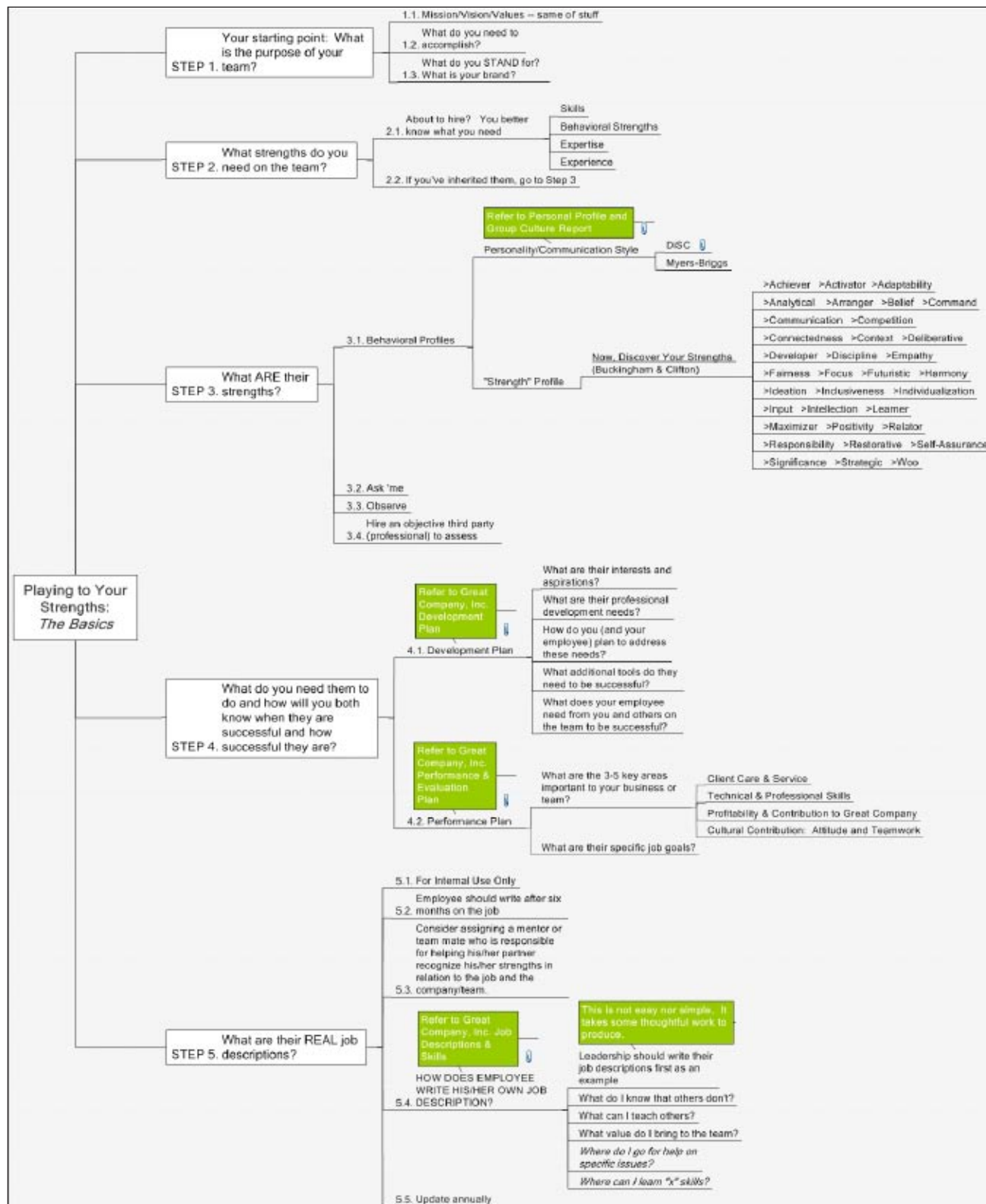
Playing To Your Strengths:

Capturing and Building On Your Team's Talents

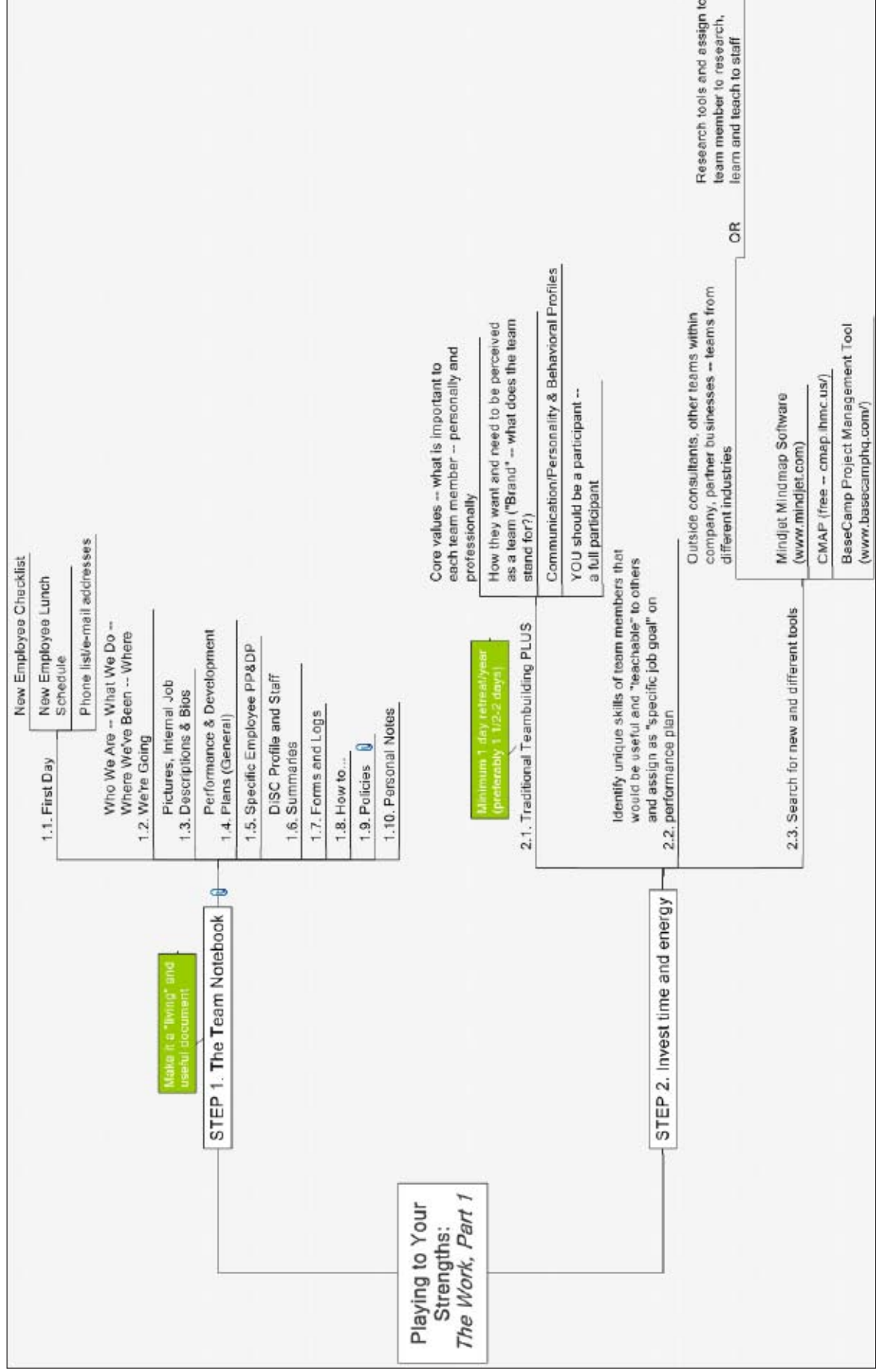


Featuring **Mike Clark-Madison**
and **Patti Summerville**

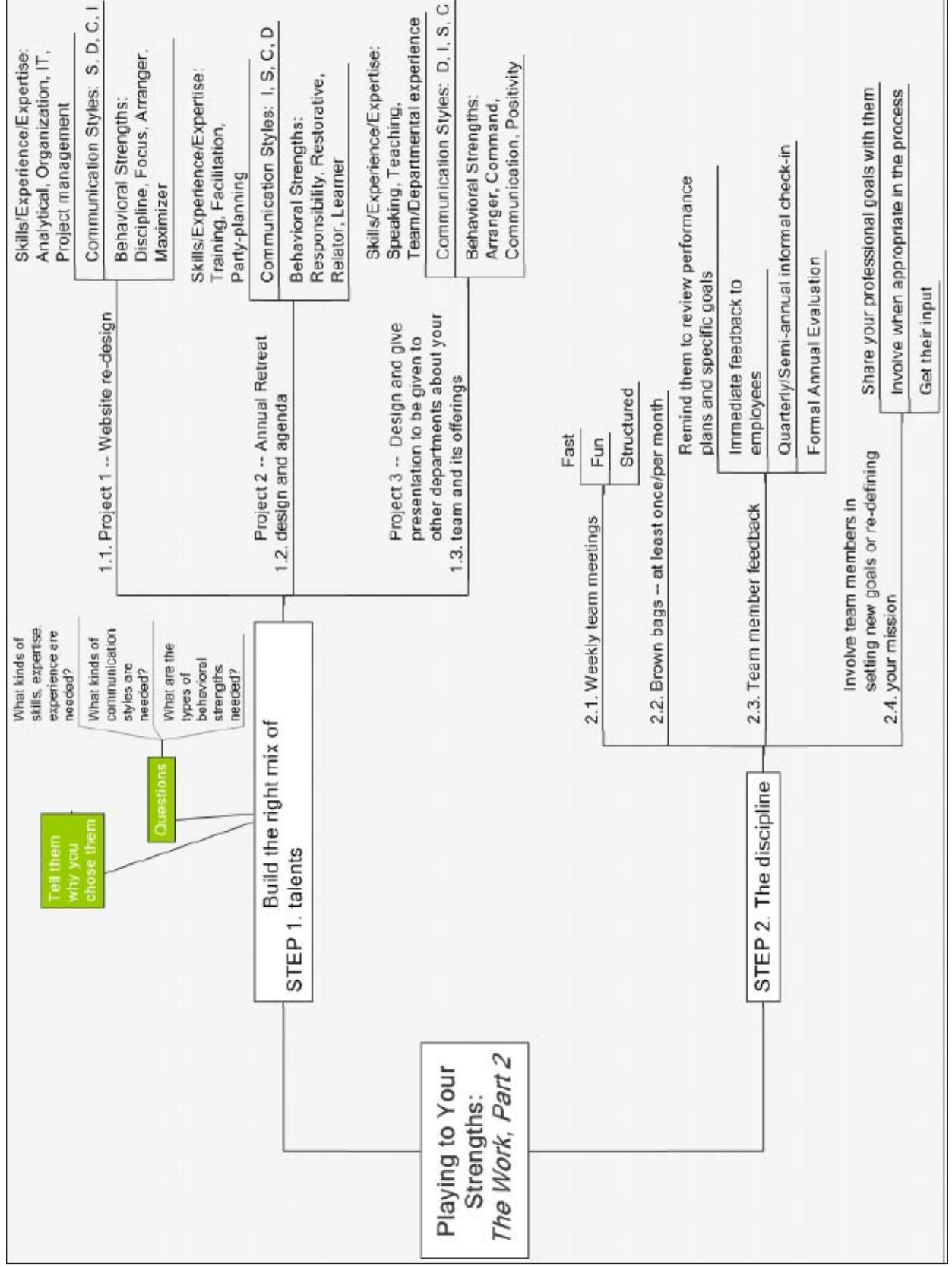
Playing to your strengths: The basics



Playing to your strengths: THE WORK Part 1



Playing to your strengths: THE WORK Part 2



Playing to your strengths: Personal Profile

	Employee Comments
<p>Interests and Aspirations What do you enjoy most about your current/past jobs? about your recreational activities, hobbies, community interests? What do you want to pursue in your future, inside or outside of GCI?</p>	
<p>Development Needs What work experiences, special assignments, personal improvement or educational activities would be helpful?</p>	
<p>Plans What is planned to meet these development needs? When? Whose responsibility to implement?</p>	
<p>Equipment, Materials & Space Needs List in priority order any and all needs you have that would make you more efficient and productive?</p>	
<p>Employee Needs What do you need from others in the firm in order to be more productive or successful?</p>	

Employee's Signature	Reviewed by:
Date	Date

Playing to your strengths: Development plan

Evaluation for:	
Time Period:	
Categories:	
· Client Care & Service	
· Technical & Professional Skills	
· Profitability & Contribution to Great Company	
· Cultural Contribution: Attitude and Teamwork	
· Specific Job Goals	

Evaluation Overall Rating:	
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EVALUATION RATINGS EXPLANATION

Rating	General Explanation
1	Far Exceeds Requirements at all Times
2	Consistently Exceeds the Requirements at all Times
3	Exceeds Requirements at Times
4	Meets Requirements
5	Does Not Meet Requirements

Playing to your strengths: Performance plan and review

	Emp. Rating	Mgr Rating
Client Care & Service:		

As the Director of Executive Administration, you touch almost every client we serve at some point; likewise, you work with virtually all account service staff. Great Company's needs and expectations for the Director of Executive Administration:

- Stay informed and up to date on all clients we serve
- Demonstrate a spirit of helpfulness and service, maintaining an attitude of excellent customer service and agency hospitality
- Represent GCI leadership to clients and team members in a professional manner.
- Demonstrate patience and good judgment in dealing with clients and their needs.
- Demonstrate appreciation for each client's business and needs.
- Organize and send gifts/gift baskets to clients as scheduled.

Employee Comments:

Manager Comments:

continued...

AUDIO CONFERENCE

Playing to your strengths: Performance plan and review

	Emp. Rating	Mgr Rating
Technical, Professional & Organizational Skills:		

As the Director of Executive Administration, Great Company needs and expects the following in terms of professionalism:

- Maintain professional growth and development through appropriate classes or coursework.
- Be prepared at all times to meet with a public official or prospective client (Translation: If you are not wearing appropriate business attire, have it available)
- Set an example as a professional to team members
- Conduct business with personal integrity and professional ethics.

In terms of organizational skills, Great Company needs and expects the following:

- Prioritize and schedule your work, signaling when you are overloaded.
- Adhere to all deadlines for internal/external clients, completing your work in a timely manner.
- Assist Executive in scheduling her time and appointments.
- Assist the production and design manager in collateral materials for the company.
- Assist the Technology Director in prioritizing work and budgeting technical needs.
- Assist principals with aspects of management of the firm, as requested
- Assist in managing the employee review process.
- Manage new employee introduction into the firm, technologically and personally.
- Be proactive in identifying issues that can be solved through better processes or methodology and implement changes.
- Be proactive in identifying projects that need to be completed or re-directed and implement completion.
- Manage receptionist's workload to increase his/her productivity and contribution to the firm, refining his/her job responsibilities as appropriate.
- Maintain the Great Company database
- Manage the receiving of mail for Executive.

In terms of technical expertise, Great Company needs and expects the following:

- Proficiency with computer skills: MAC/PC, word processing, database, powerpoint, excel
- Proficiency with fax, copiers, printers, telephone system, etc.
- Office organizational skills: filing, document storage

Employee Comments:

Manager Comments:

continued...

AUDIO CONFERENCE

Playing to your strengths: Performance plan and review

	Emp. Rating	Mgr Rating
Profitability & Contribution to Great Company:		

As Director of Executive Administration, you are expected to:

- Maintain all appropriate records and files: Executive's files, general client files, proposal files, new business files for Great Company.
- Oversee all public and private sector proposals, ensuring deadlines are met and proposals are in on time.
- Support leadership in new business development.
- Assist the principals of Great Company in creating and maintaining the Great Company corporate database
- Assist the Account Service staff in various projects requested (research, copywriting, proof-reading, brainstorming, etc.)
- Manage talent searches for the best professionals.
- Analyze aspects of the performance measures of the firm (as determined at the Great Company 2000 retreat and other aspects of tracking new business) annually
- Delegate to receptionist and interns as appropriate to even out workload among administrative staff.
- Bill minimum of 10 hours/week to a client
- Participate in other agency development activities as assigned.

Employee Comments:

Manager Comments:

continued...

AUDIO CONFERENCE

Playing to your strengths: Performance plan and review

	Emp. Rating	Mgr Rating
Cultural Contribution: Attitude & Teamwork		

Each of us is responsible for the culture of our workplace—there is no position that has more weight than any other. While “culture” might seem the soft side of the business, it is perhaps more important than any other area. You are expected to:

- Our highest vision is to be the most trusted advisor to our clients. This begins at “home”. Each of us must commit to earning and keeping the trust of each other and our clients.
- Be present!
- Honor our values of authenticity, generosity and trustworthiness
- Uphold and practice the principles that guide us:
 - Focus on what matters
 - Take risks
 - Lead by example
 - Play fair
 - Embrace ideas
 - Give more than you take
 - Stay hungry
 - Celebrate
- Demonstrate positive attitude and support a culture of care, support and service to each other and our clients.
- Contribute to an overall healthy work environment—protect and nurture our culture to attract and retain top talent and raving fans.
- Respect confidentiality and practice discretion as it relates to clients, your co-workers, and the business of the agency
- Assist the controller in employee relations involving benefits and other employee needs and new employee orientation.
- Ensure employee needs are met in the most efficient way possible for them to best serve their clients.

Employee Comments:

Manager Comments:

continued...

AUDIO CONFERENCE

Playing to your strengths: Performance plan and review

	Emp. Rating	Mgr Rating
Specific Job Goals for past year:		
Goals for the past 12 months included: <ul style="list-style-type: none"> · Act like an owner at all times and in all places... · Assist IT director in updating all equipment · Upgrade the phone system · Manage move to new space 		
Employee Comments:		
Manager Comments:		

	Emp. Rating	Mgr Rating
Specific Job Goals for next 12 months:	N/A	N/A
Goals for the next 12 months include: <ul style="list-style-type: none"> · Act like an owner at all times and in all places... · Update the Great Company database, ensuring all information is correct · Manage the intern program · Refine and upgrade filing system for Executive 		
Employee Comments:		
Manager Comments:		

TO BE COMPLETED BY MANAGER

Strengths:	
Areas to Improve:	
Other Comments:	
Employee's Signature/Date:	Manager's Signature/Date:

Playing to your strengths: REAL job descriptions

Job Responsibilities:

The descriptions below delineate what each of us has to offer, and what colleagues look to us to contribute. This is for our own internal use.



Kerry—Principal; President/CFO (with Steve as Controller)

- Being a visionary—paying attention to trends and doing the forecasting (market and universe, as well as the financial side /score keeping) and determining how to get into the future and be positioned well for it when it arrives
- Nurturing the people who send TA the business, especially the 50+ group—completing the relationship with those who built TA's reputation
- Keeping the firm fully stocked and continually relevant—scouting for talent and keeping the right people attracted to the firm
- Being on the proactive side of new business development—working on the business rather than in the business
- Serving as counsel and “judgment check” on client matters—mentoring account representatives
- **SPECIFIC SKILLS:** Storyteller; great speaker; great strategist; can solve business problems



Patti—Principal; COO on the Business Side; Director of HR; Chief Facilitator

- Facilitating each new client meeting—positioning the lead to hear everything they need to hear without focusing on the structure, as well as naturally integrating her own service offerings that support client's internal organizational work
- Putting the difficult questions and conversations on the table (internally and externally)
- Debriefing with account reps after new client meeting to offer a fresh perspective—establishing a process for building trust and a genuine partnership with client
- Providing internal coaching for the organization—supporting staff member's personal growth and serving as a resource for the organization
- Overseeing the HR responsibilities—providing performance reviews
- Implementing Kerry's big ideas—being the chief “mind-mapper”—providing project organization (“the what”) in partnership with Brian's project management (“the how”)
- **SPECIFIC SKILLS:** Online surveys, general facilitation, teambuilding retreats, strategic planning; mothering/consoling; will laugh at your jokes

continued...

AUDIO CONFERENCE

Playing to your strengths: REAL job descriptions



Brian—COO in Practice Area; Client Service Relationship Director; VP (Note: Brian was 12 when this picture was taken—he’s scheduled for new picture...)

- Directing account services—training for account service excellence within firm and being the “responsibility checker” for services to established business clients
- Quarterbacking new business prospecting—thinking about a proactive prospect and how to approach
- Responding to RFP’s—researching and/or providing the resource suggestions for winning new contracts
- Creating systems for TA as an organization—assessing staff needs (i.e. technology, resources, databases, new practices and tools) and acquiring or establishing what’s needed
- **SPECIFIC SKILLS:** Process and more process; knows where everything is in the office; institutional knowledge; proposal response and writing; wise counsel.



Ashley Smith—Sr. Account Executive

- Being a good example of a servant—whether it be serving those I work with, or providing top-notch account service to my clients
- Nurturing the TateAustin culture by playing an instrumental role in the growth and success of new hires
- Overseeing the intern program while managing Laura, Selena and McKinzey’s involvement with the interns
- Serving as a face of TateAustin in the community by staying involved and engaged with those organizations and issues that matter most and where I can make a difference
- **SPECIFIC SKILLS:** Organization, account service, leadership/management,



Jenny Luba—Account Coordinator

- Provide assistance to those around me while learning as much about the industry as possible
- Constantly improve my skills and capabilities with each day and new experience
- Foster and maintain relationships with various members of the local media
- Implement the overall strategy designed by the client team and constantly work with that strategy in mind
- Act as a reliable employee to help other account coordinators and account executives in all facets of the business
- Continue to be aware of community news and all issues relating to the firm and to our clients
- **SPECIFIC SKILLS:** Spanish proficiency, media relations, research, list-building, writing

continued...

Playing to your strengths: REAL job descriptions



McKinzey Crossland—Account Coordinator

- Providing Kerry and any other account executives or senior account executives with client service support at all times
- Facilitating all of Kerry's internal and client-related responsibilities including: scheduling; incoming/outgoing mail; phone calls and other correspondence; maintaining contacts lists; filing; and any other logistics.
- Managing all job applicants, including correspondence, interview scheduling and follow-up letters
- Maintaining a level of confidentiality and discretion when dealing with sensitive internal or client-related information
- Assisting interns whenever needed, and assisting Selena with intern program if necessary
- Acting with integrity at all times and making myself available to anyone in need of assistance
- Developing professional skills outside of the office in workshops and classes
- Maintaining the high standards set at Tate to maintain and expand our reputation as a trusted advisor
- Participating in activities outside of work with the staff members to preserve our culture
- Continuing active involvement in community organizations to serve as a representative of TateAustin and extend our spheres of influence
- **SPECIFIC SKILLS:** List building; Research; Logistics; Calendar listings; Booking speaking opportunities

Playing to your strengths: Reference notebook

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1. First Day

- a. 2006 New Tater Checklist
- b. 2006 New Tater Lunch Schedule
- c. Tater Phone List and Email Addresses

2. Who We Are—What We Do—Where We've Been—Where We're Going

- a. TateAustin Brand
- b. TateAustin At-a-Glance
- c. History/Timeline
- d. 2006 Business Plan (Sue Schutz/Highest Vision)

3. Tater Pictures, Internal Job Descriptions, & Bios

- a. Pictures & Titles
- b. Bios (to be completed)

4. Performance & Development Plans

- a. Overview—Performance Plan, Development Plan, & Evaluation Metrics
- b. Development Plan
- c. Refer to Server for all Performance Plans (Resource Server/Administrative/Reference Notebook/Ch 4 Performance & Development Plans)

5. Your Performance Plan & Development Plan

- a. Performance Plan
- b. Development Plan

continued...

AUDIO CONFERENCE

Playing to your strengths: Reference notebook

6. DiSC Profile and Staff Summaries

- a. Tater Team View
- b. Your DiSC Profile

7. TateAustin Forms & Logs

- a. Vacation Form
- b. AmEx Billing Form
- c. Memo Template
- d. Fax Cover Sheet
- e. Mileage Expense Report Form
- f. Out of Pocket Expense Form
- g. Meeting Notes Templates
- h. Estimate Form
- i. Media Call Report
- j. Insertion Order Form
- k. Image Consent Form
- l. Color Copy Log
- m. Editorial Calendar Opportunities Form
- n. Creative Blueprint

8. How To...

- a. Billing Cheat Sheet
- b. 90-Day Process

9. Policies

- a. All You Need to Know
- b. Vacation, Holidays, & Sick Time
- c. Flood Plan & Checklist

10. Personal Notes

Playing to your strengths: Company Policies

All you need to know

The following is taken from Robert Fulghum's book *All I Really Need to Know I Learned in Kindergarten*. Those phrases typed in red are TateAustin's.

All I really need to know about how to live and what to do and how to be I learned in kindergarten. Wisdom was not at the top of the graduate school mountain, but there in the sand pile at school.

These are the things I learned:

- Share everything. Most of all, share yourself, your talents, and your time.
- Play fair. Do your part and then some. You are now part of our team and we help each other. We work hard and we play hard and we share the workload.
- Don't hit people. And don't yell at 'em or talk ugly to 'em or about 'em.
- Put things back where you found them. That means in the workroom and the kitchen and the conference rooms.
- Clean up your own mess. Clean up every mess you make or a mess that someone else didn't clean up. The cleaning crew only empties the trash and cleans the floor—the rest is up to us.
- Don't take things that aren't yours. Especially Brian's things. He knows where everything is at all times—you'll never get away with it.
- Say you're sorry when you hurt somebody. Say it fast and be direct.
- Wash your hands before you eat. Probably a good idea.
- Flush. Please.
- Warm cookies and cold milk are good for you. And, we often have both.

Playing to your strengths: Company Policies

- Live a balanced life—learn some and think some and draw and paint and sing and dance and play and work every day some. **We'll all be better for it.**
- Take a nap every afternoon. **Try not to do this when a client is present.**
- When you go out in the world, watch out for traffic, hold hands and stick together. **We're all on the same team and we're here to serve each other and our clients. It's just easier this way.**
- Be aware of wonder. Remember the little seed in the Styrofoam cup: the roots go down and the plant goes up and nobody really knows how or why, but we are all like that. **Watch for wonderful things here—this is a place of miracles. Believe it.**
- Goldfish and hamsters and white mice and even the little seed in the Styrofoam cup—they all die. So do we. **And, people leave us. We survive. You will, too. Be thankful you got to share part of their journey.**
- And then remember the Dick-and-Jane books and the first word you learned—the biggest word of all—LOOK. **Just look.**

Everything you need to know is in there somewhere. The Golden Rule and love and basic sanitation. Ecology and politics and equality and sane living.

Take any one of those items and extrapolate it into sophisticated adult terms and apply it to your family life or your work or government or your world and it holds true and clear and firm. Think what a better world it would be if we all—the whole world—had cookies and milk at about 3 o'clock in the afternoon and then lay down with our blankies for a nap. Or if all governments had as a basic policy to always put things back where they found them and to clean up their own mess.

And it is still true, no matter how old you are, when you go out in the world, it is best to hold hands and stick together.

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