



JQ Annual Evaluation Form

DDG + PST

COUNSELOR

CAPITALIST

COLLEAGUE

As a firm, our Vision guides *where* we're going.
Our Mission is *why* we exist. Our Values exemplify *who*
we are at our best. Your job description outlines what is
expected of you at various points in your career at Jarrard.

And JQ is our resource that determines how we are doing on our path to all of these.
It's a journey for sure – one that takes commitment, investment and growth. As a firm,
we are committed to your growth but it all starts with you. You will need to own your
growth and development with our support.



A Look Back

Congratulations! Whether this was your first year at Jarrard or your tenth, your growth journey continues. We hope this year was a year of growth, connectivity and performance for you. Please take a few minutes to reflect on your year and share thoughts below.

WHAT ARE YOU MOST PROUD OF FROM THIS PAST YEAR?

List out a few of your wins that make you proud.

WHAT WERE SOME OF YOUR HARDER CHALLENGES?

And if you overcame those challenges, we'd love to hear how.

GROWTH GOALS OR PLANS THAT WERE MET

SOMETHING YOU'RE EXCITED ABOUT FOR THE COMING YEAR, PROFESSIONALLY

Counselor

DELIVERING RESULTS

ADMIN/DESIGNER/ STRATEGIST	SENIOR ADMIN/ DESIGNER/ STRATEGIST	MANAGER/ART DIRECTOR	SENIOR MANAGER/ ART DIRECTOR
<ul style="list-style-type: none"> » Listens well/asks questions for clarity » Knows what is expected of them » Delivers strong execution » Meets deadlines consistently » Error-free work 	<ul style="list-style-type: none"> » Frames a problem accurately and easily » Executes consistently well » Proactively seeks clarity and assistance when needed » Manages complex projects seamlessly » Raises hand to help others or 'have the ball' 	<ul style="list-style-type: none"> » Exceeds on expectations within the work » Seeks out new projects and has ideas for new initiatives » Brings fresh thinking and perspective to the work » Contributes to others' projects to help get things to the finish line 	<ul style="list-style-type: none"> » Provides strategic input and vision for their work as well as others' projects » Helps remove obstacles or barriers for others » Encourages creative thinking and solutions, leading by example » Manages their own projects/timelines as well as oversee others

APPLYING EXPERTISE

ADMIN/DESIGNER/ STRATEGIST	SENIOR ADMIN/ DESIGNER/ STRATEGIST	MANAGER/ART DIRECTOR	SENIOR MANAGER/ ART DIRECTOR
<ul style="list-style-type: none"> » Reliable and dependable within the project parameters » Brings energy and hustle to the work » Curious about their professional development and defining an expertise 	<ul style="list-style-type: none"> » Dedicates time to professional development » Sharpening skills and becoming known for strengths » Seeks out others for coaching and growth 	<ul style="list-style-type: none"> » Sought after for their area of expertise and counsel » Offers their talents freely and finds a way to say 'yes' when asked » Understands the nuances and politics of each situation to bring best solutions 	<ul style="list-style-type: none"> » Trusted go-to resource for perspective and contributions » Helps teach and coach others in their area of expertise » Engages to help resolve complicated problems and crises

CREATING SOLUTIONS

ADMIN/DESIGNER/ STRATEGIST	SENIOR ADMIN/ DESIGNER/ STRATEGIST	MANAGER/ART DIRECTOR	SENIOR MANAGER/ ART DIRECTOR
<ul style="list-style-type: none"> » Able to work independently toward solutions » Seeks guidance when needed » Able to toggle between strategy and execution easily, grasping both » Is responsive and reliable » Consistent and error-free in work deliverables 	<ul style="list-style-type: none"> » Assesses situations quickly » Able to see big picture as well as details within the work » Offers solutions that are appropriate to the situation – budget and nuances » Willing to be try new things – confidence to step out of comfort zone » Expresses valuable insights that advance the work and thinking » Avoids jumping to conclusions or making assumptions 	<ul style="list-style-type: none"> » Offers proactive/ outside the box solutions and ideas for their work » Encourages others to think big on their projects » Provides clear and compelling rationale for their ideas & recommendations » Demonstrates a growth-mindset with learning and accessing new information » Seamlessly applies experience and solutions from one situation to another 	<ul style="list-style-type: none"> » Strong demonstration of new thinking, new solutions – with strategic foundation and rationale » Identifies opportunities when new thinking is needed and brings it » Ability to stimulate team members and direct reports for growth » Provides insights in order to advance the work of others » Identifies opportunities for new products or growth areas for the firm

ENGAGING OTHERS

ADMIN/DESIGNER/ STRATEGIST	SENIOR ADMIN/ DESIGNER/ STRATEGIST	MANAGER/ART DIRECTOR	SENIOR MANAGER/ ART DIRECTOR
<ul style="list-style-type: none"> » Solicits feedback from colleagues and peers » Sees value in all colleagues' perspective and backgrounds » Keeps team members informed when relevant to them » Keeps managers and team leads engaged on project details and timelines » Readily offers assistance on projects, when colleagues are strapped for time or multiple priorities 	<ul style="list-style-type: none"> » Cheers on the team, expressing confidence in self and others » Gets along easily with all colleagues » Sees value in collaboration and seeks to collaborate with others » Seeks out diverse perspectives, bringing them along on the project/process » Maintains confidentiality as a trusted colleague » Proactively communicates if deadlines or projects are in jeopardy 	<ul style="list-style-type: none"> » Able to delegate well, with guidance and support » Demonstrates ability and value in managing up » Offers solutions to issues or challenges » Understands political landscapes and how to navigate for buy-in and approvals » Shares experience to help others grow and learn » Understands and demonstrates when confidentiality is needed 	<ul style="list-style-type: none"> » Helps others navigate buy-in and approval process within firm » Inspires confidence and reassurance in others » Handles a wide variety of circumstances – difficult and routine » Sought after for delicate advice » Seen as a trusted confidante by others » Makes time for others and quick with solutions

COMMUNICATING CLEARLY

ADMIN/DESIGNER/ STRATEGIST	SENIOR ADMIN/ DESIGNER/ STRATEGIST	MANAGER/ART DIRECTOR	SENIOR MANAGER/ ART DIRECTOR
<ul style="list-style-type: none"> » Communicates professionally, clearly and succinctly » Written communication is error-free and appropriate to the situation » Listens well to others and keeps track of details » Proactively communicates if deadlines or priorities are in jeopardy » Seeks to clarify the ask or project details 	<ul style="list-style-type: none"> » Writes and speaks consistently clearly and persuasively » Shares information easily and proactively; keeps colleagues informed » Listens for nuance and context and applies it to solutions » Thinks creatively and effectively communicates ideas » Proactively provides updates and key project information to all involved 	<ul style="list-style-type: none"> » Communicates complex strategic concepts easily and simply » Clear, concise presentations and messaging » Uses the art of storytelling and emotion to impart key ideas » Seeks differing views, information and ideas in order to make solutions better » Believes in integrated perspectives and proactively seeks them 	<ul style="list-style-type: none"> » Is always clear and easy to follow across all mediums » Uses experience and insights to offer creative solutions and guidance » Distills disparate and various ideas and information into key insights or solutions » Instills in others the values of communicating clearly » Sought after for advice/wisdom because they are trusted

Capitalist

THE BUSINESS OF THE FIRM

ADMIN/DESIGNER/ STRATEGIST	SENIOR ADMIN/ DESIGNER/ STRATEGIST	MANAGER/ART DIRECTOR	SENIOR MANAGER/ ART DIRECTOR
<ul style="list-style-type: none"> » Meets billing targets, if applicable » Submits time daily, per standards, if applicable » Learning the firm's key service lines » Understands the firm's resources available to them 	<ul style="list-style-type: none"> » Demonstrates knowledge of the firm's service lines and key offerings » Eager to learn more, participating in trainings and seeking out subject matter experts » Manages internal expenses and resources wisely 	<ul style="list-style-type: none"> » Understands how the firm makes money and the client billing process » Speaks proficiently about the firm and its services with clients or networks » Uses time efficiently for their own projects and tasks » Remains mindful of team's hours on a project 	<ul style="list-style-type: none"> » Understands team utilization and capacity » Manages teams and work efficiently against client budget, deliverables and goals » Stewards of client budgets (profitability/ proper usage of team hours) and firm's budgets/ resources

VISIBILITY (OF SELF AND FIRM)

ADMIN/DESIGNER/ STRATEGIST	SENIOR ADMIN/ DESIGNER/ STRATEGIST	MANAGER/ART DIRECTOR	SENIOR MANAGER/ ART DIRECTOR
<ul style="list-style-type: none"> » Begins building a network and identifying a group (e.g. association) to join » Shares firm's TL through own channels 	<ul style="list-style-type: none"> » Participates in networking opportunities » Represents the firm well in professional and social events 	<ul style="list-style-type: none"> » Actively engages in a professional society or organization » Is building a network of industry peers » Shares firm's TL on own channels with thoughtful 'takes' 	<ul style="list-style-type: none"> » Utilizes network to generate awareness of Jarrard – leading to prospect leads, talent leads, TL opportunities, etc. » Shows interest in, and early action in, contributing to TL

ENTREPRENEURIALISM

ADMIN/DESIGNER/ STRATEGIST	SENIOR ADMIN/ DESIGNER/ STRATEGIST	MANAGER/ART DIRECTOR	SENIOR MANAGER/ ART DIRECTOR
<ul style="list-style-type: none"> » Shows interest in expanding knowledge of the industry 	<ul style="list-style-type: none"> » Expands their knowledge of the healthcare industry » Has an entrepreneurial nature in how they approach growth for the firm 	<ul style="list-style-type: none"> » Understands the industry and our capabilities within it » Generates creative ideas for promoting and growing the firm 	<ul style="list-style-type: none"> » Identifies new product or service offerings to grow the firm and benefit clients » Finds fresh opportunities to elevate the firm's reputation

FARMER (ORGANIC GROWTH)

ADMIN/DESIGNER/ STRATEGIST	SENIOR ADMIN/ DESIGNER/ STRATEGIST	MANAGER/ART DIRECTOR	SENIOR MANAGER/ ART DIRECTOR
<ul style="list-style-type: none"> » Delivers well on projects we have to instill confidence with existing clients 	<ul style="list-style-type: none"> » Listens for opportunities on client teams to deepen the relationship » Listens for client cues to help grow the business 	<ul style="list-style-type: none"> » Proactively brings ideas to client team lead to grow existing business » Plants seeds with clients and client teams that we can help them with new challenges 	<ul style="list-style-type: none"> » Demonstrates listening and proactive approach to growing existing client relationships » Keeps relationships warm (clients, CPs), with appropriate check-ins » Shares Jarrard TL content with clients and networks » Shares news and relevant articles with clients and networks

HUNTER (NEW BUSINESS)

ADMIN/DESIGNER/ STRATEGIST	SENIOR ADMIN/ DESIGNER/ STRATEGIST	MANAGER/ART DIRECTOR	SENIOR MANAGER/ ART DIRECTOR
<ul style="list-style-type: none"> » N/A 	<ul style="list-style-type: none"> » Assists with new business scopes and proposals as needed » Understands overall revenue and growth goals of the firm and seeks to support them 	<ul style="list-style-type: none"> » Shows initiative around the practice's growth targets » Seeks relationships with existing clients and networks – to cultivate new business 	<ul style="list-style-type: none"> » Assists in development of new business on occasion; participates in pitches and proposals as needed » Seeks out and nurtures new networking relationships that could bring new partnerships or business to the firm » Active representation of the firm at industry/firm conferences and events, for business development » Actively attuned to changes in the industry that present opportunities for the firm and our clients » Thinks strategically about how to generate new business

Colleague



HUSTLE & HEART

We have a tireless drive and passion for our clients – and we believe our work makes healthcare better. We are entrepreneurs who prize initiative and are quick to jump in and roll up our sleeves. “I want the ball!”



OWN IT TOGETHER

In all things, we are a team. We collaborate and lean on each other’s strengths. We submit our own self-interest to do what’s best for the band. Win or lose, we are accountable to each other, the firm and our clients.



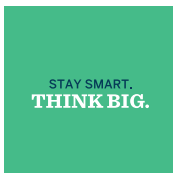
THE KIND TRUTH

With great thoughtfulness, we give our clients and each other our very best counsel. We challenge each other to be better. The Kind Truth calls for true vulnerability and respect both in how we share and how we listen.



CELEBRATE THE WINS

We take time to honor each other, the firm and our clients. We don’t take ourselves too seriously and we like having fun.



STAY SMART. THINK BIG.

We have intellectual curiosity that pushes us to keep learning and to stay ahead of the curve (and our clients). We bring imagination and unexpected ideas to the table.

Evaluation

As part of our commitment to provide you with a rich professional development experience, we culminate ongoing feedback discussions and Quarterly reviews with a more formal review of your performance each year, with our JQ Annual Evaluation. This is an opportunity to pause and reflect on your overall accomplishments, strengths and areas to focus your development, moving forward. This is a two-way conversation so please express yourself with your manager during this process. Ultimately, the colleague should own their growth experience with guidance from managers, peers and leaders of the firm.

Colleague Name:

Manager/Evaluators:

Date of JQ Evaluation:

PERFORMANCE RATINGS

Descriptions of our performance ratings are included here for your quick reference in completing this evaluation form. As you evaluate your direct report, you will be rating how they are performing against the expectations of their current title band.

Underperforming: Colleague is currently not meeting their title band expectations within a competency. This rating should be used prudently and judiciously. Managers should have documentation from previous conversations to support this rating.

Performing: Colleague shows a working command of the skills and knowledge required in current role. They plan their work, work well with teammates and meet expectations within their title band.

Excelling: Colleague is expanding skills and knowledge required in their role and title band. They are beginning to apply perspective and context from one experience to another to guide their actions. They intuitively understand what to do and how to do it.

Mastering: Colleague demonstrates depth of skills and knowledge required in their role and title band. They are sought after for their counsel and input internally and with clients. Importantly, they are also leading by example and coaching up others in their roles.

Counselor

As you evaluate your direct report, you will be rating how they are performing against the expectations of their current title band. You should refer to the expected behaviors within their title band for reference to their performance.

DELIVERING RESULTS

Underperforming

Performing

Excelling

Mastering

APPLYING EXPERTISE

Underperforming

Performing

Excelling

Mastering

CREATING SOLUTIONS

Underperforming

Performing

Excelling

Mastering

ENGAGING OTHERS

Underperforming

Performing

Excelling

Mastering

COMMUNICATING CLEARLY

Underperforming

Performing

Excelling

Mastering

Capitalist

As you evaluate your direct report, you will be rating how they are performing against the expectations of their current title band. You should refer to the expected behaviors within their title band for reference to their performance.

THE BUSINESS OF THE FIRM

Underperforming	Performing	Excelling	Mastering
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VISIBILITY (SELF/FIRM)

Underperforming	Performing	Excelling	Mastering
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ENTREPRENEURIALISM

Underperforming	Performing	Excelling	Mastering
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FARMER

N/A	Underperforming	Performing	Excelling	Mastering
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HUNTER

N/A	Underperforming	Performing	Excelling	Mastering
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Colleague

Please include verbatims and feedback from colleagues and peers as it relates to where they shine when it comes to our Values.

HUSTLE & HEART

OWN IT TOGETHER

CELEBRATE THE WINS

THE KIND TRUTH

STAY SMART. THINK BIG.

Performance Summary/ Growth Plan

OVERALL ASSESSMENT

Contributions to the firm, to the team and clients.

Overall Average Rating:

Under Performing

Performing

Excelling

Mastering

TOP 2-3 STRENGTHS

Please use specific examples, referring to the competencies and behaviors where relevant.

TOP 2-3 AREAS FOR DEVELOPMENT

Please use specific examples, referring to the competencies and behaviors where relevant.