



JQ Annual Evaluation Form

ADVISOR GROWTH JOURNEY

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

SOCIAL INTELLIGENCE

ADVISOR	SENIOR ADVISOR	MA	SMA
<ul style="list-style-type: none"> » Solicits feedback from colleagues and peers » Is comfortable knowing opportunity areas exist » Sees value in all team members » Seeks guidance if workloads are creating stress » Pursues work with enthusiasm and optimism » Owns mistakes and seeks learning opportunities » Maintains confidentiality 	<ul style="list-style-type: none"> » Can work independently to accomplish project goals and deliverables » Asks the right questions to advance the work » Appropriately projects self-confidence » Begins to demonstrate ability to manage up, keeping team leads informed 	<ul style="list-style-type: none"> » Learns from mistakes and successes » Is open to new ideas and ways of working » Shares experiences to help others learn and grow » Consistently self-regulates emotions when tension arises » Strives to be better » Cheers on the team, expressing confidence in self and others » Demonstrates our Jarrard values » Gets along easily with all colleagues and collaborators 	<ul style="list-style-type: none"> » Is flexible, adapts to circumstances naturally » Builds rapport and trust, especially during tense times » Skillfully steers through clients' reluctance, missteps and blind spots » Knows clients' priorities and can adapt to them » Drives toward buy-in » Recognizes client vulnerability and empathizes » Adapts to and includes other views in real-time » Regards uncertainty as a challenge, not a threat » Is self-aware of gifts and blind spots

COMMUNICATING CLEARLY

ADVISOR	SENIOR ADVISOR	MA	SMA
<ul style="list-style-type: none"> » Communicates professionally, using straightforward and honest language » Writes and edits materials well, with an eye toward details » Inspires confidence among clients and team members » Seeks help in improving verbal and written skills » Listens well to others and keeps track of key details » Proactively communicates when deadlines cannot be met 	<ul style="list-style-type: none"> » Effective communication with team members, clients and team leads » Strong writer and editor, producing client-ready materials consistently » Instills confidence with clients through listening, clarifying goals and follow through » Offers solutions to challenges rather than just communicating a challenge 	<ul style="list-style-type: none"> » Speaks and writes simply and to the point, avoiding jargon » Writes consistently clearly and persuasively » Seeks to be persuasive toward the campaign objective » Shares information easily; keeps the team informed » Listens for context and nuance » Grasps a client's unique tone; writes and convey ideas verbally to suit specific audiences » Thinks creatively and effectively communicates ideas » Identifies appropriate cadence for communication 	<ul style="list-style-type: none"> » Portrays strategy, concepts and ideas simply » Makes clear, concise and engaging presentations » Is recognized for stimulating dialogue » Uses case studies and current events to anchor learning » Uses story and emotion to impart a key idea » Creates audience-specific materials that are easy to follow » Seeks differing views, information and ideas

PROJECT EXPERTISE

ADVISOR	SENIOR ADVISOR	MA	SMA
<ul style="list-style-type: none"> » Listens well and asks questions for clarity » Knows what is expected of them » Delivers strong execution » Keeps the Jarrard teams organized with weekly planning » Able to handle multiple priorities, working on time management skills » Shows initiative » Writes clearly 	<ul style="list-style-type: none"> » Delivers strong execution, consistently and error-free » Takes initiative to lead, first drafts and more » Spearheads the execution of projects, serving as project manager for the team » Point person for tactical execution and project status » On-time and on-budget delivery of work; time management expertise 	<ul style="list-style-type: none"> » Frames a problem accurately and quickly » Executes consistently well » Frames written and verbal communication well » Proactively seeks assistance, when needed, for managing multiple priorities » Collects and synthesizes data effectively » Manages complex projects seamlessly 	<ul style="list-style-type: none"> » Delivers or exceeds on expectations consistently » Understands nuances of complex client work and client organizations » Seeks new project opportunities, aka “give me the ball” » Is fluent and proactive with software solutions and tools needed for our work » Analyzes data effectively to advance the work

SKILLFUL INFLUENCERS

ADVISOR	SENIOR ADVISOR	MA	SMA
<ul style="list-style-type: none"> » Eager to demonstrate hustle » Actively seeks guidance when needed » Is responsive and reliable 	<ul style="list-style-type: none"> » Anticipates the needs of the team » Understands and appreciates the nuances of each client and each campaign, for unique solutions » Leverages the experience and perspective of peers/cohorts as well as from more senior team members 	<ul style="list-style-type: none"> » Thoughtfully builds client relationships » Assesses client situations quickly » Anticipates and troubleshoots problem areas for clients » Expresses valuable insights that advance the team’s thinking » Takes feedback well and learns quickly » Avoids jumping to solutions or conclusions 	<ul style="list-style-type: none"> » Builds and sustains trusting client relationships » Artfully navigates client politics » Reads the room and pivots in the moment » Gains client trust and is approached for additional work » Is skillful in persuading and influencing clients and team members » Makes the complex simple and gets to the heart of the matter quickly » Offers mature counsel that is actionable

AUTHENTIC PRESENCE

ADVISOR	SENIOR ADVISOR	MA	SMA
<ul style="list-style-type: none"> » Is trustworthy, accountable and reliable » Observes and tries to model excellence » Does the right thing—always acting with integrity 	<ul style="list-style-type: none"> » Remains calm and capable under pressure » Leads with trustworthy behaviors and serves as an example to more junior team members » Actively observes, and seeks out, more senior team members to learn from them in leading clients 	<ul style="list-style-type: none"> » Promotes collaboration and a healthy team environment » Actively contributes to the team and client » Is mature and credible with colleagues and clients » Is willing to be candid with colleagues in the spirit of kind truth » Creates strong, error-free content that is client-ready » Communicates clearly in all mediums 	<ul style="list-style-type: none"> » Convenes productive conversations, using a wide variety of tactics and styles to gain agreement » Is poised and engaging with clients at appropriate levels and in varied settings » Expresses views confidently and succinctly » Sets the tone for the team and contributes to a healthy team environment » Leads by example and guides others in being trustworthy, accountable and reliable » Shares the wins among the team and the client » Always acts with clients’ and firm’s best interests in mind

Capitalist

THE BUSINESS OF THE FIRM

ADVISOR	SENIOR ADVISOR	MA	SMA
<ul style="list-style-type: none"> » Meets billing targets » Submits time daily, per standards » 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; interested in learning more » Speaks w about the firm and its services with clients » Uses time efficiently for 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)

VISIBILITY (OF SELF AND FIRM)

ADVISOR	SENIOR ADVISOR	MA	SMA
<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

ADVISOR	SENIOR ADVISOR	MA	SMA
<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, their clients, and our capabilities » 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)

ADVISOR	SENIOR ADVISOR	MA	SMA
<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 with clients 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 » Listens for opportunities to grow business with existing clients » Begins to plant the seeds with clients 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 CPs » Shares news and relevant articles with clients and CPs

HUNTER (NEW BUSINESS)

ADVISOR	SENIOR ADVISOR	MA	SMA
<div>» N/A</div>	<div>» Assists with new business scopes and proposals as needed</div> <div>» Understands overall revenue and growth goals of the firm and seeks to support them</div>	<div>» Shows initiative around the practice's growth targets</div> <div>» Seeks relationships with existing CPs and networks – to cultivate new business</div>	<div>» Assists in development of new business on occasion; participates in pitches and proposals as needed</div> <div>» Seeks out and nurtures new networking relationships that could bring new partnerships or business to the firm</div> <div>» Active representation of the firm at industry/firm conferences and events, for business development</div> <div>» Actively attuned to changes in the industry that present opportunities for the firm and our clients</div> <div>» Thinks strategically about how to generate new business</div>

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!”



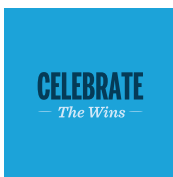
OWN IT TOGETHER

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.



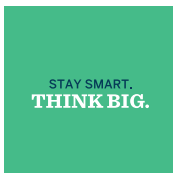
THE KIND TRUTH

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.

PROJECT EXPERTISE

Underperforming

Performing

Excelling

Mastering

COMMUNICATING CLEARLY

Underperforming

Performing

Excelling

Mastering

SOCIAL INTELLIGENCE

Underperforming

Performing

Excelling

Mastering

SKILLFUL INFLUENCER

Underperforming

Performing

Excelling

Mastering

AUTHENTIC PRESENCE

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.