

## 2015 Performance Reviews

Manager Summary For : Ross, Priya M

Manager Summary Prepared By: Brian Singer, Brian Kinsella, John Nelson, Johanna Diaz

Division and Region: Global Invest Rsch Division - Americas

### 1. What are this person's key strengths (up to 3)?

- (1) Professionalism. Priya moved to the E&P team and relatively seamlessly integrated into the group. She has helped to work towards securing corporate access events for Brian, helped onboard John Nelson and new junior members on the team, worked well with Brian Singer. John Nelson and Brian Kinsella's busy travel schedule and is helping to coordinate the 2016 Energy Conference. She has tirelessly inputted SMART contacts from large client conference calls over the last year.
- (2) Teamwork. Priya is a good collaborator that likes to work with others, receiving praise from Corporate Access and from sales. She works well with other assistants on the team. Priya has successfully enhanced the Business Unit culture with a positive attitude and making sure birthdays are recognized. Priya was an organizer of an intra-business unit competition that helped improve/sustain morale.
- (3) Outward poise. Priya receives favorable feedback from some reviewers for working well under pressure, and is thought of as "Resourceful, reliable, personable." She has built an efficiency that leaves her with opportunity to take on additional responsibilities (which we would like to see her do in the coming year).

### 2. What are this person's key areas for development (up to 3)? For each development area, please describe specific actions this person should take to improve his/her effectiveness.

- (1) Adjustment to firm culture. As Priya has transitioned from a contingent worker to a full-time employee, our expectations of her have risen, Priya has not fully embraced this. Specifically, we look for Priya to aspire to go above-and-beyond, versus getting through the basic checklist (although as we noted above, she has contributed to bringing a badly-needed social improvement to the broader Energy & Utilities business unit). In addition, Priya should strive to be more receptive and responsive to feedback. We've started to see positive progress in this area very recently, and it's important that Priya recognize that she will continue to receive real-time feedback and that it's meant to help her do well.
- (2) Being more proactive. In some cases such as coordinating marketing handouts, Priya is proactive to ensure sufficient execution not at the last minute. In other instances, particularly during periods of travel/transportation, Priya can sometimes miss the mark. Priya sufficiently does what is asked, but does not always ask or think ahead. This is a critical area of development over the next year because her team needs her to be more aggressive in identifying potential issues/conflicts and highlighting solutions.
- (3) Commercial impact. This is not a precise necessity for an assistant, but Priya will be a key resource to enhance her analysts' Corporate Access scores by developing relationships with IR assistants and helping to coordinate NDRs and field trips. She has been helpful to Brian Singer but can further this in the coming year in addition to helping John Nelson out as well.
- (4) Attention to detail/operating under pressure. Priya can still improve on this, particularly on more complex requests. She should ensure there is follow through and escalation when necessary. Finally, there is room to improve on her ability to work effectively in pressure situations.