

12 Week Self Evaluation

Name: _____

Date: _____

1. I'm currently working PFProcessing (circle one) Full Time Part Time Hours per week: _____
 Is this where you want to be? (circle one) Yes No

2. List your most significant accomplishments or contributions during the review period.

3. Have there been any special circumstances that have helped/hindered you? *If yes, explain?*

4. Describe professional development activities that have been helpful (off-site seminars & training, on-the-job experience, PFP University Site)

5. What else would help you to do your job better and provide you greater job satisfaction?

6. Is there anything you wanted to do or accomplish, but were unable to? Why?

7. Are you having fun with Pay it Forward?

8. Are the current training tools effective to help you learn on your own? (circle one) Yes No
If no, what tools and/or training can PFP improve:

9. Income:

Current Monthly check: _____ Title: _____ # of active clients: _____

Goal Monthly check: _____ Title: _____ # of active clients: _____

10. How are you going to increase the number of people in your profile? (networking, social media, etc)

11. Are you closer to the lifestyle you want?

12. BOLD- Dream Clients: 1) _____ 2) _____

10. Nonprofits

Nonprofit:	Weekly Call- Day:	Time:
Check Amount:	Goal Check Amount:	
Current Processing Volume:	Expected Processing Vol. for next year:	

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Current Check Amount:	Goal Check Amount:	
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My top 2 strengths that are instrumental in accomplishing my goals:

- 1.
- 2.

My top 2 Strategies for achieving these goals: (One of these should be somewhat out of your zone)

- 1.
- 2.

Top 2 Skills to increase to move you to close your goal:

- 1.
- 2.

	Contacts	Appt	Present	Close
Ratio Warm Market:	10	7	5	3

5 4 3 2 1 Selling Products & Services (Rate your understanding: 5 Highest - 1 Lowest)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Using a variety of approaches
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Using Pipedrive
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Obtaining statements and completing and MQ
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Understanding how to present an analysis
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Completing the Merchant Application and Setup process
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Participating in PFP sales promos and marketing programs
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Learning all PFP products and services
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Understanding customer needs to suggest better product choices
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Collaborating with PFP Office Staff by providing accurate account info
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Identifying sales opportunities by cross-references competitive brands with company preferred brands to better serve your clients

5 4 3 2 1 Managing Accounts (Rate your abilities: 5 Highest - 1 Lowest)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Following up when mailings are sent
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Following up at least every 90 days to ask how things are going, determine whether there have been new developments in the company that may benefit from other PFP products.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Asking for referrals
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Updating and maintaining customer info in Pipedrive

5 4 3 2 1 Using Company and Personal Resources (Rate how beneficial they are: 5 Highest - 1 Lowest)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Participating in ongoing PFP training, conference calls, and webinars to maintain up-to-date knowledge of products, services, trends, and company policies.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PFP Accountability Call
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Applying questioning and listening skills (7 question rule)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Effectively articulating written and verbal communication

5 4 3 2 1 About the PFP Workplace (Rate your perception of working with PFP: 5 Highest - 1 Lowest)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I feel genuinely appreciated at PFP
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	There is a lot of negativity at PFP
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	This company operates by strong values and ethics
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	My manager makes it easier to do my job well
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	My pay is fair for the work I do
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I feel well-informed about important decisions at PFP
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	This job has failed to meet the expectations I had when I started
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New ideas are encouraged at PFP
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	At PFP, we do things efficiently and well
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	My job makes me feel like I am part of something meaningful
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I have the flexibility I need to balance my work and personal life
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	My manager helps me learn and grow
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I have confidence in the leaders of PFP
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I get the formal training I want for my career
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I have considered searching for a better job in the past month
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	This company enables me to work at my full potential
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	My manager cares about my concerns
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PFP motivates me to give my very best at work
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I believe this company is going in the right direction
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I would highly recommend working at this company to others
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	I felt pressured to respond positively to these questions