PERFORMANCE EVALUATION GRID

PEG

Schneider Downs introduces the Performance Evaluation Grid (PEG) system, an innovative program developed to provide organizations with an effective and measurable approach for providing peer-to-peer feedback.

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INSIGHT ■ INNOVATION ■ EXPERIENCE

HOW DO YOUR EMPLOYEES' SELF-ASSESSMENTS COMPARE TO MANAGEMENT'S VIEW?

The Performance Evaluation Grid (PEG) is a proprietary, web-based program developed to dramatically improve upon the traditional evaluation process.

PEG provides a streamlined process that is easy to customize for your firm's needs, yet it is easy to use and effective.

CUSTOMIZED FOR YOUR FIRM

No two organizations are the same, and neither are their leadership teams. The PEG system takes this individual nature into account, permitting each client to select its own leadership attributes for measurement.
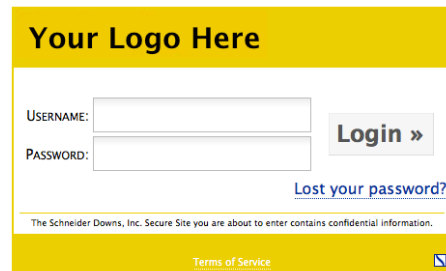
The site is branded to the organization including logo and color scheme.

Simply put, PEG allows organizations to predetermine the specific leadership traits that they consider most important, and then provides a tool for measuring performance in those categories.

Once the appropriate traits have been selected, an electronic PEG format is generated, providing employees with an online self-assessment form through which they can evaluate themselves, based on a numeric rating system (1 through 100). Fellow employees are then also invited to complete PEG evaluations for their co-workers, resulting in the opportunity to compare self-perceptions against the evaluations of peers. Comparisons are possible through the use of the standardized rating system.

> "IT WAS IMPORTANT TO US THAT WE COULD CUSTOMIZE THE LEADERSHIP TRAITS TO FIT OUR OWN NEEDS. THE KNOWLEDGE THAT OUR EVALUATIONS WERE BASED ON TRAITS THAT WE SELECTED PROVIDED THE PEG SYSTEM WITH IMPORTANT CREDIBILITY TO OUR SHAREHOLDERS. "
>
> *Sean P. Roddy*
> *Chief Operating Officer*
> *Watkins Meegan, Bethesda, MD*

EASY TO USE, EASY TO UNDERSTAND

PEG was designed to be an easy to use, time-efficient program to process very detailed information. By standardizing the leadership traits being evaluated, PEG provides all individuals with an "apples-to-apples" analysis of their performance.
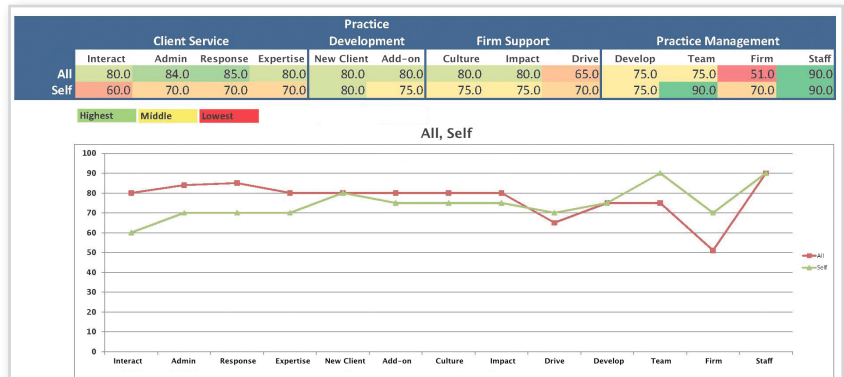
All evaluations are conducted online on a secure server, and can be completed by all participants at their convenience. The interface is user-friendly and can quickly be utilized without significant training or instruction. The approach is very similar to completing an online survey or questionnaire.

EFFECTIVE

The process culminates with a series of numeric ratings that highlight each individual's strengths, while also providing constructive feedback

An example "all compared to self" report.

regarding traits that can be targeted for improvement. The program can isolate specific instances where there may be a disconnect between an individual's self-assessment and the actual scores from the evaluating group. PEG also generates a graphic display visually indicating ratings for each trait, making it easy to visually compare performance between attributes.

PEG CONTENT

Companies can customize most aspects of the PEG, including the attribute categories, the attributes themselves and even the descriptions under the attributes. The final reports can also be customized by person as to what reports are generated, ordered and named. Following are examples of attributes:

Client Service Skills	Wealth Creation	Community Presence
Client Retention Skills	Firm Impact	Leadership
Technical Knowledge	Business Judgment	Firm Participation
Practice Development	Engagement Administration	**Any other attributes**

EVALUATION OPTIONS:

Top-Down

Peer-to-Peer

Bottom-Up

Companies can focus the PEG process on differnt groups of individuals to help focus the feedback. Management reviews of staff, management peer reviews or staff reviews of management are all possibilities.

PEG is a module of SD inSITE.

What is SD inSITE? SD inSITE is a web-based application that gives employees and other individuals associated with your organization a central place to go where they can submit and retrieve information. SD inSITE is an automated workforce management tool that can assist your organization with:

- Tracking and reporting on time for payroll and billing
- Tracking and reporting on employee expenses
- Tracking and reporting on customer/client demographic data
- Tracking and reporting on the employee evaluations, peer reviews and partner evaluations
- Tracking and reporting on general business data collection
- Remotely accessing key business management documents

Individuals can submit time and expenses, and they can keep personal contact information up to date.

Individuals can retrieve documents, view organization-wide calendars, perform online employee evaluations, view time-off balances and perform many labor-saving tasks.

To learn more about SD inSITE, please contact Patrick Armknecht at 412-697-5386 or parmknecht@schneiderdowns.com.

About Schneider Downs Technology Advisors

Schneider Downs Technology Advisors is committed to providing value-added technology services and solutions to our clients. We strive to create on-going, mutually beneficial relationships with our clients by focusing on client satisfaction, delivery of quality service and the continuous education and training of our staff. In today's ever-shrinking and demanding world market, one of the most challenging tasks facing a company is utilizing and processing information effectively and efficiently.

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