

PERFORMANCE APPRAISAL

Employee Name	Scott Downie	Manager Name	Mary Felice Crowe
Position Title	Technical Writer 2	Department Name	Software Products
Appraisal Date	September 1, 1996		

Position Summary/Job Expectations

Describe the major responsibilities of the position.

As a technical writer for the software products group, Scott is responsible for designing and writing documentation for Farallon's software products including online help, technical manuals, users's guides, and release notes. To accomplish this Scott must work with the engineering teams, the editor, the project manager and the cross-functional team to produce and deliver the documentation within schedules. He must understand the Windows and Macintosh platforms, our Timbuktu products, and tools necessary to produce the documentation. He should stay current on documentation trends and tools in order to continually evolve our documentation. He should also understand our customers and target markets in order to create documentation that meets both the customers's and company's needs.

List major accomplishments during the past year.

- Revamped the documentation to create a 'greener' product
- Designed and wrote the paper documents for Timbuktu Pro 2.0 for Macintosh.
- Completed the online help for Timbuktu Pro 1.1 for Windows, which was begun in the previous review period. Scott won two awards from the Society for Technical Communications for this online help.
- Wrote the documentation - electronic files - for Farallon's first Internet applets - Look@Me for Mac and Windows and FlashNote for Windows.
- Generated Acrobat versions of the paper documentation for Timbuktu Pro for a sales/demo CD.
- Worked on the Cisco Remote team and figured out how to put their documentation on the Web.
- Overhauled the Windows Help for the Katmandu project and created the first 'draft' of that online help file.

PLEASE NOTE: Comments in each category are not required but are recommended in clarifying an assessment and/or providing an example.

Job Knowledge/Technical Skills

Understands the principles, processes and procedures of the functional area; effectively applies appropriate strategies, techniques and methodologies. Understands inter-relationships and impact of actions on systems.

Needs Improvement			Generally Effective			Strength		
1	2	3	4	5	6	7		
[]	[]	[]	[]	[]	[]	[]	[]	[x]

Low: Lacks sufficient knowledge to get the job done. Uses inappropriate methods to solve problems. Lack of understanding impedes appropriate decision making.

Medium: Understands relevant concepts and procedures. Applies them appropriately.

High: Demonstrates superior technical knowledge. Is seen as a resource for the function.

Comments:

Scott breadth of technical knowledge exceeds the requirements of his writer position. He demonstrates not only an indepth understanding of the documentation technologies and tools, but also of the Timbuktu technologies and the platforms that we support. He is an early adopter of technologies and utilizes as fully as possible the latest tools to produce outstanding documentation. And he keeps up to date with the latest tools, trends, and developments in the field through news groups, surfing the Web, and reading books and technical journals. Only a writer with Scott's level of understanding and of the technologies would be able to implement as thorough and useful Apple Guide assistance as we have in TB2 Pro.

Efficiency/Time Management

Successfully structures tasks within deadlines. Employs time management skills, establishes priorities, monitors goals and responds in a timely manner to requests from others. Produces accurate work.

Needs Improvement			Generally Effective		Strength	
1	2	3	4	5	6	7
[]	[]	[]	[]	[]	[]	[x]
Low: Inconsistent in meeting deadlines; procrastinates; takes a "wait and see" position; uses time inefficiently; frequent mistakes, causes problems and/or requires revisions.			Medium: Usually accomplishes goals on time; usually works on the most important issues; makes occasional errors.		High: Schedules time to plan; "works smart"; consistently deals with highest priorities, sets goals and accomplishes them; works quickly and accurately.	

Comments:

Scott schedules his time well, sets priorities appropriately, and completes his work well within the schedules. His ability to stay focused and work consistently toward his goals. Because he manages his time well, he is able to juggle multiple writing assignments concurrently. He was able to respond quickly to the requests for the applet 'online help' and for the Acrobatized documentation without negative schedule impact to other projects. Because he does not put off work until crunch time, he generated a new style of online help for Katmandu all before switching to work on AppleGuide full time.

Teamwork

Works well with others and fully cooperates with the team to accomplish group tasks, goals or objectives. Builds productive, cooperative relationships.

Needs Improvement			Generally Effective		Strength	
1	2	3	4	5	6	7
[]	[]	[]	[]	[]	[]	[x]
Low: Works in isolation; creates discord; undermines the efforts of others.			Medium: Contributes to group efforts; is generally cooperative		High: Easily elicits cooperation of others. Goes out of way to help; participates productively in group efforts.	

Comments:

Scott is very much a team player and works to ensure the success of the whole team, regardless of the assignment. He has earned the respect and admiration of the developers, QA engineers, tech support and project manager. When there is a need for documentation, most often the first person requested is Scott. Scott has demonstrated that he is willing to put in the extra effort to make the team successful.

Communication

Clearly conveys one's intended message. Has appropriate written and verbal skills and acts as a conduit for information up and down the organization. Listens well, solicits the input of others.

Needs Improvement			Generally Effective		Strength	
1	2	3	4	5	6	7
[]	[]	[]	[]	[]	[]	[x]
Low: Impedes flow of information; is so verbose others lose patience listening; fails to relate necessary facts to appropriate audience; unable to clarify or to interpret for others; has poor writing skills			Medium: Usually keeps people informed; presents information clearly and concisely; holds on to some information; expresses self well with peers but not with all levels of management.		High: Always keeps people informed; presents information clearly and concisely; conveys information quickly and effectively to all the necessary people; expresses self well to peers, subordinates and management.	

Comments:

In keeping with his writing talents, Scott has outstanding communication skills. He is at the top of my list for keeping me informed of the status of his work, ideas for directions we should take, and project issues that need resolution. He can

communicate complex ideas clearly and concisely. He helps ensure the success of the projects by keeping the communication open not only with the people in the KS office, but also with the cross-functional teams. He also solicits feedback and is extremely responsive to reviews and comments on the documentation.

Customer Relations

Is dedicated to meeting the expectations and requirements of internal and external customers in a timely fashion. Establishes positive relationships; leaves customers with an experience of having been served.

Needs Improvement			Generally Effective			Strength	
1	2	3	4	5	6	7	
[]	[]	[]	[]	[]	[]	[x]	
Low: Expresses annoyance and frustration with customers and their needs. Is rude and inflexible. Demonstrates a "my way" or "not at all" approach.			Medium: Is generally pleasant and attentive to needs of customers. Sometimes invokes policies or procedures without regard to situations.			High: Always seeks to understand customers needs. Responds appropriately; creates goodwill effortlessly.	

Comments:

Scott is indeed dedicated to meeting the needs of our product customers by producing truly useful documentation. The Apple Guide assistance for TB2 Pro 3.0 is an excellent example of making the most of the documentation format to meet customer needs. Scott is equally committed to meeting the needs of the internal customers - technical support, project management and engineering. Not only is he dependable, but he frequently goes beyond the scope of his job or assignment to ensure he meets the 'customer's needs. As an example, on the Cisco Remote project, Scott helped the Cisco team put all their documentation on the Web, rather than just dealing with the Timbuktu part.

Initiative

Anticipates needs and takes action without being asked. Stretches his/her job description to take part in issues outside of his/her defined responsibilities. Takes on problems to resolve, and assumes the lead in getting things done.

Needs Improvement			Generally Effective			Strength	
1	2	3	4	5	6	7	
[]	[]	[]	[]	[]	[]	[x]	
Low: Waits to be asked; misses opportunities to take charge; depends on others for direction; unable to see what needs to be done.			Medium: Generally sees what needs to be done and acts; sometimes finds new activities to support his/her manager's objectives; often acts on problems instead of complaining.			High: Eagerly assumes responsibility to get the job done; insatiable desire to learn and be involved; suggests solutions to problems regardless of who "owns" them.	

Comments:

Scott does indeed have an insatiable desire to learn and get the job done. He is always proactive in learning about new technologies and adopting new methods whenever appropriate. For example he took the initiative to revamp the way the online help works for Katmandu to give us a style of help appropriate for a Web-centric product. He even created a method for printing more than one topic at a time. Before assuming responsibility for the Apple Guide, he learned Apple Guide and then implemented one piece of the guide to set up the template and standard for the work. He simply never waits to be asked - he looks for opportunities to make improvements.

Judgment

Applies astute reasoning and logical thinking to problems and to generate alternative solutions with appropriate speed and decisiveness. Responds to the “right” issues, maintains objectivity and grasps interrelationships.

Needs Improvement			Generally Effective		Strength	
1	2	3	4	5	6	7
[]	[]	[]	[]	[]	[x]	[]
Low: Makes decisions without consideration of what is workable; reacts without processing available information; has difficulty making decisions; decides unimportant issues and leaves key issues hanging.			Medium: Looks for what is workable; gathers appropriate information but sometimes moves too quickly or too slowly; is usually logical and easy to follow; usually pays attention to the most important issues.		High: Takes a systematic approach to problems and issues; assesses a situation from all angles; consistently makes high quality decisions.	

Comments:

Scott applies his experience and knowledge to make solid decisions. solve problems. He takes a broad perspective on problem-solving and tries to assess all perspectives of an issue. Scott should strive for more objectivity and balance in his approach to the documentation. While he has been committed to creating the perfect Apple Guide and has expended maximum effort to reach that goal, his time and energy may have been better spent for the business being applied to other aspects of that project or Katmandu.

Ownership/Accountability

Demonstrates a sense of responsibility and accountability for results and situations. Is solutions oriented.

Needs Improvement			Generally Effective		Strength	
1	2	3	4	5	6	7
[]	[]	[]	[]	[]	[]	[x]
Low: Blames circumstances or other people for lack of results; fails to look beyond the immediate for solutions; has an “I can’t” attitude.			Medium: Develops solutions for problems within area of responsibility; admits to own errors; sometimes hesitant to step in and resolve issues.		High: Consistently looks for solutions to problems within the company; volunteers to resolve issues; accepts responsibility for successes and missed opportunities; looks for impact of own actions on results and situations.	

Comments:

Scott looks for the best solution or implementation to whatever he works on. He readily assumes responsibility, as with the Cisco work, where he not only completed the writing work required for Timbuktu, but he also tutored the Cisco tech writer in the ways of FrameMaker and HTML so that their documentation would be usable.

Training and Development

What steps could the employee take to improve performance in the current position?

Scott should strive to take a broader business perspective to his work and apply the appropriate level of effort to his assignments.

Participate on the Katmandu team in writing the paper docs and in giving feedback and suggestions when appropriate.

Overall Rating (based on accomplishments and competency assessment ratings)

Needs Improvement			Generally Effective		Clearly Outstanding	
1	2	3	4	5	6	7
[]	[]	[]	[]	[]	[]	[x]

Low: Performance partially meets expectations for this position. Improvement in this area is necessary for the employee to fully meet expectations. Has not mastered all functions to be performed.

Medium: Performance consistently meets expectations for the job. Knows and performs the job requirements well. May exceed expectations occasionally.

High: Performance far exceeds standards and expectations for this position. Employee demonstrates highest standards consistently. (This rating is reserved for top performers.)

Manager's Overall Summary

Scott's performance since the last review period has been impressive. He has a depth of knowledge on both the Mac and Windows platforms that far exceeds the requirements of the position. He stays abreast of trends and technologies in systems and documentation through reading, news groups, using the Internet and the Web. To understand the Web, Scott built a home page many months ago. Scott applies all his knowledge and experience to improving the processes for generating documentation and to the documentation itself. Scott is a team player and strives to deliver the best documentation possible to ensure the success of the product. He sets very high standards for himself and is willing to put in whatever effort is required to meet or exceed the standard. Scott has shown that he is customer focused in his work with Cisco and with the outstanding Apple Guide that he created.

Employee Comments

Mary Felice Crow
Manager Signature

9/4/96
Date

2nd Level Manager Signature

Date

Scott D. Sumner
Employee Signature

9/4/96
Date

Human Resources Signature

Date