

in the department. However, as projects were assigned to Susan, it appeared that she tended to become so engrossed in each project that important departmental personnel matters were neglected. One example was a situation that occurred earlier in the year when it became necessary to discharge the cash management clerk. In her position as controller, Anita had expected Susan to be more involved in overseeing the clerk's performance and noting or correcting any improprieties. She believed that Susan had failed to appropriately monitor and manage the situation. This aspect of Susan's management style concerned Anita.

Anita wanted to make sure that her upcoming evaluation of Susan's performance included her appreciation for the significant and substantial contributions that she had made to the accounting department over the last year. She also, however, had to include her concerns in the evaluation. Specifically, she needed to convey to Susan the need to develop her interpersonal skills and to take the appropriate disciplinary action on her own when necessary. Anita considered how she could best approach Susan without causing bad feelings that might lead to the loss of one of Marco's most valuable employees.

Anita had expected Susan to be more of a "take-charge" person and to be more outgoing and assertive. She had had excellent references and had been highly spoken of by those with whom she had previously worked. Although Susan produced excellent reports and analyses that

required minimal input from Anita, she had not made any obvious effort to assume responsibility for directing and supervising the department personnel. No one could deny that Susan was highly motivated and an outstanding performer on the tasks she was assigned. But, Anita wondered why Susan was so reluctant to perform these duties at Marco. She performed them in her previous position; why isn't she doing it here?

The following week, Anita met with Susan to discuss Susan's annual performance evaluation. Anita began the discussion by saying:

You've been at Marco for over a year now and it's time we evaluated your performance. Let me begin by telling you that you're doing a great job and we're giving you a nine percent salary increase. I am pleased with your overall contribution to the accounting department over the past year. You did an excellent job with the Touche Ross audit of Marco International and with the Ernst and Young audit of the company's financial statements.

However, I am concerned that you appear to feel uncomfortable working with other managers within the company. I want you to begin attending the monthly production meetings. These meetings should give you a feeling of where the company's projects are in the production process and the problems encountered, some of which may have accounting implications. You'll also have the opportunity to get to know more

of the people within various departments. And, we'll figure out some other ways in which you can interact more with the other managers.

Take a couple of minutes to read through your Employee Evaluation Report (Appendix I and Appendix II) and let's go over any concerns you might have.

As Susan read the evaluation, she failed to notice the many positive comments. Never in her 32 years had she felt more of a failure. "What should I do now?" she thought. "I know I have terrific technical and administrative skills. How can I become a better manager? Or, should I even try?" Intellectually, she knew how important it was to her career that she display strong interpersonal skills and she knew that she should have been more involved in personnel matters and politics within the department. She disliked dealing with conflict and being even marginally involved in internal politics. And, quite truthfully, she didn't know what steps to take to become more aware and involved. She believed that Anita's recommendations would undoubtedly help, but she was afraid that it would take more energy and time than was possible on both their parts. But, once again, as was typical of Susan, she chose not to share her feelings with Anita and signed the evaluation. With copy in hand, she returned to her office overlooking Sunset Boulevard to further consider her options.

SUSAN REYNOLDS' EMPLOYEE EVALUATION REPORT

EMPLOYEE EVALUATION REPC

Date of this evaluation 1/22 Date of previous evaluation

Reason for evaluation. [X] General Performance. [X] Salary Increase. [] Promotion.

Name Susan Reynolds Soc. Sec. No. 444-55-2222

Job Title Controller Dept. Accounting Clock No.

Date Hired 9/15 Time Employed one [X] Years [] Months

Education: [] Elementary [] Junior H.S. [] Senior H.S. [] College 1 2 3 4

Current Salary \$ 85,000 per year Time employed at this rate one [X] Years [] Mo

Date of last previous increase Previous rate of pay \$ per

Time employed at present job [] Years [] Months Date of last promotion

ATTENDANCE RECORD

[X] Excellent [] Good [] Poor

Number of days absent this year Approved days Unauthorized days

Number of days absent last year Approved days Unauthorized days

Number of days late this year Number of days late last year

WORK PERFORMANCE

Ability to do job assigned: [] Superior [] Meets Standard [] Below Standc

Comments on job ability: See attached

Comparison to previous evaluation: [] Improved [] No Change [] Negative

Productivity: [] Superior [] Meets Standard [] Below Standc

Comments on productivity: Susan's ability to complete projects in a timely manner is excellent. She is an extremely hard worker and always puts in whatever time is necessary to complete projects on time.

Comparison to previous evaluation: [] Improved [] No Change [] Negative

Ability to follow instructions:

Excellent Good Poor

Comments on ability to follow instructions: _____

Comparison to previous evaluation:

Improved No Change Negative

—Comparison to previous evaluation—

Cooperation	<input checked="" type="checkbox"/> Excellent	<input type="checkbox"/> Good	<input type="checkbox"/> Poor	<input type="checkbox"/> Improved	<input type="checkbox"/> No Change	<input type="checkbox"/> Negative
Attitude	<input checked="" type="checkbox"/> Excellent	<input type="checkbox"/> Good	<input type="checkbox"/> Poor	<input type="checkbox"/> Improved	<input type="checkbox"/> No Change	<input type="checkbox"/> Negative
Initiative	<input type="checkbox"/> Excellent	<input checked="" type="checkbox"/> Good	<input type="checkbox"/> Poor	<input type="checkbox"/> Improved	<input type="checkbox"/> No Change	<input type="checkbox"/> Negative
Work Habits	<input checked="" type="checkbox"/> Excellent	<input type="checkbox"/> Good	<input type="checkbox"/> Poor	<input type="checkbox"/> Improved	<input type="checkbox"/> No Change	<input type="checkbox"/> Negative

Comments on cooperation, attitude, initiative and work habits: _____

PERSONAL

Relationship with fellow employees:

Well liked Accepted Other (explain below)

See attached

Relationship with customers:

Excellent Good Unsatisfactory (explain below)

n/a

Comparison to previous evaluation

Improved No Change Negative

Personality (check those which apply):

Friendly Out-going Courteous Aloof Neat in appearance Untidy

Enjoys work Dependable Conscientious Calm under pressure Nervous

Complains excessively Negative influence on others Positive influence on others

Desire for achievement: High Average Low

SUMMARY OF EVALUATION

Overall evaluation: Positive Negative

Overall comparison to previous evaluation: Improved No Change Poorer

Continued employment: Recommended Not recommended

Salary increase: Recommended Not recommended

Recommended salary increase: \$ 8,000 - 9% per year Effective 1/22

Promotion: Recommended Not recommended. Job Change: Recommended Not recommended

Recommended promotion: _____ Effective _____

Recommended job change: _____ Effective _____

COMMENTS

The overall performance of Susan's work is excellent, except for the area discussed in the attachment. This, however, is not such a problem that she cannot perform her work satisfactorily.

Date _____ Evaluated by Anita Lockwood

Date _____ Recommendations approved by _____

Susan has been a valuable addition to the accounting department. In the past year she has assumed responsibility for:

1. Accounting related to our foreign tax structure
2. Overseeing the audit of Marco and its subsidiaries by Deloitte and Touche
3. Mentoring the reporting requirements to US Commerce Dept. re: foreign ownership of US corporations
4. Coordinating and completing audit schedules for year end and quarterly reviews by Ernst & Young
5. Coordinating the gathering of information and documents for completion of the tax return

Susan is very reliable and her strong technical skills have been

instrumental in accomplishing many special projects. For example:

1. Analysis of the foreign/domestic inter company balances and activity.
2. Foreign vs. domestic cash flow statements.

Susan has been very helpful in completing these and other day-to-day projects. Her work is always accurate and she is always willing to do whatever is necessary to complete the task at hand, even if it means working through the night!

My only concern is Susan's tendency to stay in her office and avoid contact with others in the company. As the controller, she should be involved with the production, postproduction, licensing, royalties,

and other departments. She should be aware of the activity going on in each and should "touch base" with the department heads periodically to determine what requirements of the accounting department will be made in the future.

She should also become more involved in the personnel matters of the department. She should be aware at all times of the status of work in the department and should be the first "manager" to tackle personnel problems as they arise.

I'll work with Susan in the near future to provide opportunities for her to develop these interpersonal skills and I feel that with little effort she should be able to improve in this area.