

Administrative Professional Effectiveness Assessment for Professional Development Improvement

Name of Administrator being evaluated:

Directions:

Below is a list of competencies, behaviors and functions required of a star-performing administrative professional. How well does your administrative partner perform these tasks or demonstrate these behaviors? If you are not certain, because you have not given attention to or observed that area, please mark "N."

Scale: **1** **2** **3** **4** **5** **N**
 Needs Improvement Fair Good Very Good Exceptional Not Observed Enough to Rate

Appointment Coordination						
Acquires necessary information from manager to plan appointments effectively.	1	2	3	4	5	N
When scheduling appointments, allows adequate time between appointments.	1	2	3	4	5	N
Gathers necessary information related to appointment (contact information, venue, and other relevant information).	1	2	3	4	5	N
Focuses on day-to-day planning and calendar to optimize time while addressing pertinent priorities and requests.	1	2	3	4	5	N
Looks for written correspondence regarding upcoming meetings and sets aside or files in appropriate meeting folder (electronic or other).	1	2	3	4	5	N
Researches and filters information or pre-reads; selectively supplies appropriate information to manager to save time.	1	2	3	4	5	N

Scale: **1** **2** **3** **4** **5** **N**
 Needs Fair Good Very Good Exceptional Not Observed
 Improvement Enough to Rate

Manager Support

Assists manager on projects to free manager to accomplish other tasks.	1	2	3	4	5	N
Provides written or verbal updates on projects without being asked.	1	2	3	4	5	N
Interacts professionally with all levels of the organization on behalf of manager.	1	2	3	4	5	N
Communicates manager’s goals to staff.	1	2	3	4	5	N
Works with manager to manage and facilitate email correspondence.	1	2	3	4	5	N
Discusses ideas for process improvement with manager.	1	2	3	4	5	N
Embraces additional responsibilities as assigned by manager.	1	2	3	4	5	N
Functions independently; minimum direction is required from manager.	1	2	3	4	5	N
Initiates daily touch-base meeting (whether in person or on the telephone) to confirm daily priorities, clarify assignments, get answers to questions, or resolve open issues.	1	2	3	4	5	N
Sifts through information to determine what is important to leader.	1	2	3	4	5	N
Clarifies manager’s expectations about tasks to be performed.	1	2	3	4	5	N
Ensures manager is organized, on-time and well prepared for whatever lies ahead.	1	2	3	4	5	N
Prompts manager of action items to ensure on-time delivery.	1	2	3	4	5	N

Managing Office Technology

Troubleshoots hardware and/or software problems.	1	2	3	4	5	N
Seeks knowledge of system specialist when unable to troubleshoot computer problems.	1	2	3	4	5	N
Uses word processing and other programs to streamline job.	1	2	3	4	5	N

Scale: **1** **2** **3** **4** **5** **N**
 Needs Improvement Fair Good Very Good Exceptional Not Observed Enough to Rate

Professional Development

Establishes a plan to improve skills that need developing.	1	2	3	4	5	N
Seeks advice from mentors or superiors.	1	2	3	4	5	N
Sets performance goals in line with department or company mission.	1	2	3	4	5	N
Pursues opportunities for professional development.	1	2	3	4	5	N
Develops a diverse support system at work.	1	2	3	4	5	N
Works around barriers to accomplish goals.	1	2	3	4	5	N

Supporting Multiple Managers

Looks ahead to upcoming projects to plan time accordingly.	1	2	3	4	5	N
For large projects, asks manager to give materials in segments to prevent overload.	1	2	3	4	5	N
Keeps multiple managers individually informed on their projects and status of work.	1	2	3	4	5	N
When supporting multiple managers, communicates the status of each manager's project in relation to other projects.	1	2	3	4	5	N

Task, Time and Project Management

Takes action without procrastination.	1	2	3	4	5	N
Evaluates work habits for greater efficiency; purposely seeks and creates methods to streamline processes.	1	2	3	4	5	N
Completes assignments in a timely manner within defined parameters.	1	2	3	4	5	N
Gives attention to details when performing tasks.	1	2	3	4	5	N
Monitors deadline dates set by manager.	1	2	3	4	5	N
Completes important projects in a timely, efficient manner above and beyond the minimum required.	1	2	3	4	5	N
Growing attention to moving beyond task work to focus on maximizing the functions within her/his role and area.	1	2	3	4	5	N
Institutes day-to-day processes for managing the range of issues, tasks, and daily events that occur.	1	2	3	4	5	N

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Scale: 1 2 3 4 5 N
Needs Fair Good Very Good Exceptional Not Observed
Improvement Enough to Rate

Teamwork and Collaboration

Networks across the organization. 1 2 3 4 5 N

Cultivates strong relations across the organization leading to improved output. 1 2 3 4 5 N

Carries out actions that help the team. 1 2 3 4 5 N

Proactive about improving working relationships. 1 2 3 4 5 N

Willing to teach (show) team members processes or how to use technologies. 1 2 3 4 5 N

Demonstrates leadership among administrative peers. 1 2 3 4 5 N

Delegates responsibilities to team members where and when appropriate. 1 2 3 4 5 N

Applies emotional intelligence: facilitates situations for a positive outcome. 1 2 3 4 5 N

Works to maintain a harmonious work atmosphere. 1 2 3 4 5 N

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General Comments from Executive:

What are the specific strengths of this individual?

What areas need the most improvement?

Additional comments that might explain the above ratings further are encouraged.

Submitted By *(Executive's Name)*

Day time telephone number

Title

Date

NOTE: If you have hired Joan Burge for coaching, return this assessment to:

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