



Assistant Controller  
Monthly Coaching and Review

Date:	GP \$ TY	GP \$ LY	GP \$ % VAR LY	GP %	GP % VAR LY	COGS % TY	COGS % LY
Month to Date							
Year to Date							
	EXPENSE RATIO	EXPENSE RATIO VAR LY					
Month to Date							
Year to Date							

CATEGORIES	MANAGER SCORING	SUPERVISOR SCORING	COMMENTS
Communication			
Planning/Organizing			
Initiative			
Accuracy/Attention to Detail			
Time Management			
Flexibility			
Teamwork			

**7 Performance Factors**

*1. Skill/Knowledge 2. Capacity 3. Resources 4. Feedback 5. Internal Motivation 6. Consequences 7. Clear Expectations*

**ACTION PLAN - HOW MUCH AND BY WHEN**

**WHAT** - What are the two areas that will improve over the next 30 days?

1. \_\_\_\_\_ 2. \_\_\_\_\_

**HOW** - What specific actions and/or development are required?

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

**WHEN** - When will the individual complete the “How” assignment?

1. \_\_\_\_\_ 2. \_\_\_\_\_

**HOW MUCH** - What improvement (outcome) is expected over the next 30 days?

\_\_\_\_\_

\_\_\_\_\_

**Other Comments:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

This Month's Goals					
GP \$	GP %	Expense Ratio	Supervisor Initial/Date	Manager Initial/Date	Follow-up Date