Performance Metrics

The **performance and efficiency** of the Process & Training Associate are assessed using the **metrics** found on the **EOS Scorecard.** 📈

For each Process & Training Associate, the EOS Scorecard:

- **Assesses capacity**- What is your availability?
- **Evaluates build-out efficiency**- How efficiently do you complete your work?

The EOS Scorecard **collects data from Harvest**(Time Tracking Program)**,** documenting time spent on project tasks.

Project tasks in Harvest are synced with assigned tasks in Asana(Project Management Program).

The data is then inputted into the scorecard and keeps a **collective metrics record** for all Process & Training Associates.

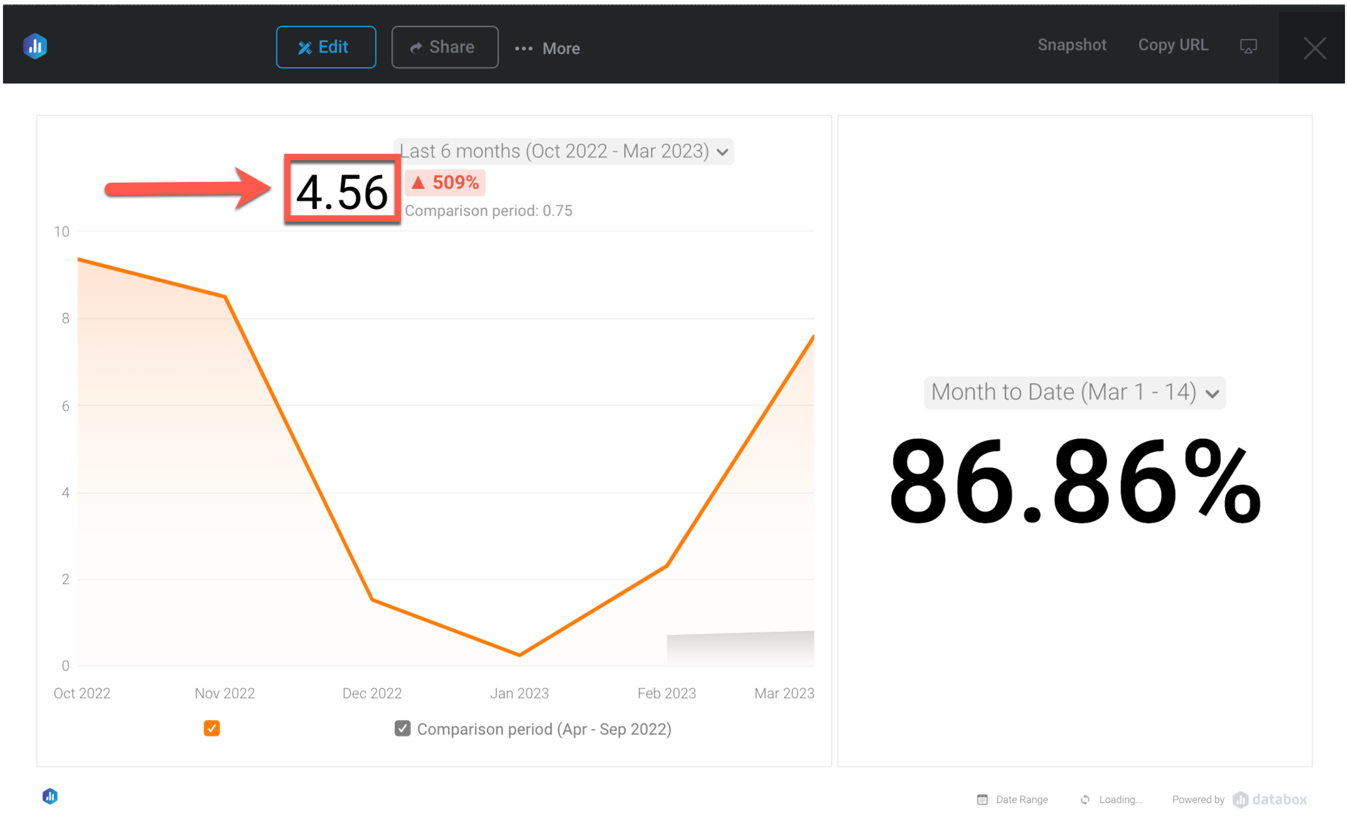
📍 The lower the metrics, the greater the efficiency of the Process & Training Associate.

Build-Out Efficiency

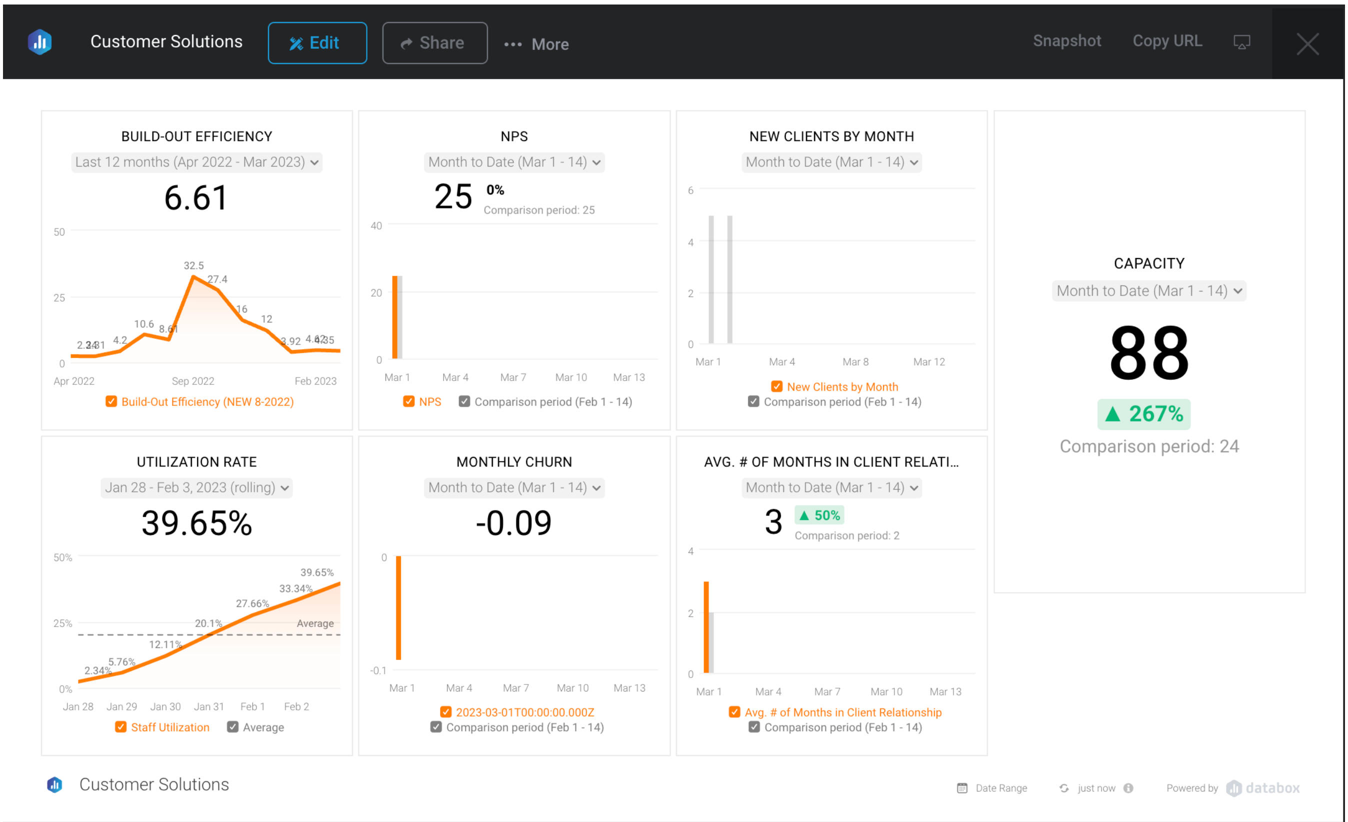
This refers to the amount of time spent **building out content for every one-hour recording.**

The golden standard for this metric is **4.**

This means that your goal, on average, is to take **less than 4 hours** to extract and optimize content from a one-hour recording.



During L10 meetings, the collective data for all Process & Training Associates is reviewed. 🔍

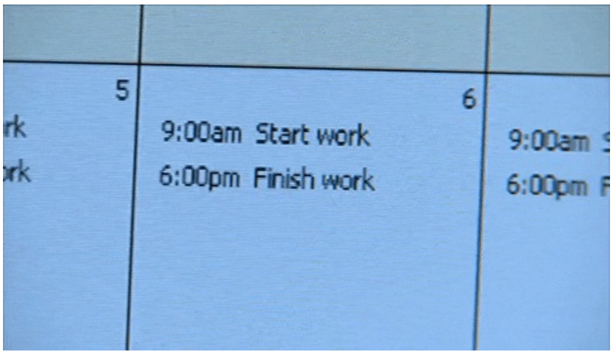


Individual metrics are **discussed during weekly 1:1 meetings** with your Process & Training Lead.

If your metrics are **lower** than the standards, keep up the great work! Continue to set goals to help increase and maintain your efficiency.

If your metrics are **higher** than the standards, that's okay! **Discuss strategies for increasing your efficiency with your Process & Training Lead.** It can also be helpful to talk with your fellow Process & Training Associates to learn how they have made their processes more efficient.

Now that you have learned how your performance will be assessed, let's dive more into the actual work itself.



A day in the life of a Process & Training Associate **can look different from day to day,** depending on your **current workload** and the **status of the projects** you are working on.

It is important to **manage your workload** so your daily responsibilities and deadlines do not become overwhelming.

Ensure you are **familiar with project deadlines** and **allot an appropriate amount of time** in your work schedule to meet your deadlines.

If you encounter a time when a deadline is approaching, and you realize you will be **unable** to meet the deadline, be a **problem-solver.** 💡

It is still **YOUR responsibility** to complete the tasks assigned to you.

Consider solutions to help you reach your deadline as soon as possible:

- Identify the roadblocks preventing the deadline from being reached on time. What would eliminate the roadblocks?
- Is there any assistance/information you can obtain from your Lead?
- Connect with your fellow Project & Training Associates to see if they have the capacity to lend a hand.

No matter your workload or project status, on a daily basis, it is important to:

📍 Check your email and Slack for messages

📍 Check Asana for project updates and new task assignments

📍 Schedule your workweek according to your workload and deadlines

📍 Ensure you are on track to meet deadlines

➡ **Head to the next step** to learn about your weekly meetings as a Process & Training

Weekly Meetings

On a weekly basis, you will have **two Slack meetings** as a Process & Training Associate: a **1:1 meeting with your Process & Training Lead (30 minutes)** and a **Level 10 Meeting (60 Minutes)** with your team.

Both of these meetings will be on a **recurring schedule.**

Your lead will let you know when these meetings will occur.

1:1 Meeting with Process & Training Lead

You will have a regularly scheduled 30-minute meeting with your Process & Training Lead each week. 👥

The purpose of this meeting is to **review your performance metrics,** 📈 **discuss goal progress, check in on any issues you are having, and inform one another of client/project status updates.**

Prior to this meeting, you will need to set the agenda by filling out your [1:1 Framework Document.](https://app.trainual.com/great-lakes-advisory/steps/14617459)

Click here to view your content:https://app.trainual.com/great-lakes-advisory/steps/14617459

This is a great time to ask your Lead **clarifying questions** regarding your projects and let them know if there is anything you need from them to succeed in your role or your current workload.

Your weekly 1:1 is a **judgment-free space.** 😏

Even though your Lead oversees your performance and workload progress, it is important to **demonstrate accountability and initiate conversations with your Lead when needed.** 💪

Once a week, your team will meet for a **Level 10 meeting.**

Level 10 Meetings are part of the **Entrepreneurial Operating System (EOS) Framework**, followed by Great Lakes Advisory. 📜

Level 10 meetings are **60 minutes** in length and occur **at the same time each week.** ⏰

‼️ **Attendance at Level 10 meetings is extremely important.** ‼️

⬇️ Level 10 Meetings follow this agenda:

Click here to view your content:https://app.trainual.com/great-lakes-advisory/steps/14617460

❓ Wondering what each of these agenda items entails? Here's a breakdown:

Segue

The segue is the "icebreaker" of the meeting, meant to **segue the start of the meeting from light conversation to the meeting agenda.** During the segue, the team will often discuss recent happenings in their lives or participate in small talk.

📈 Scorecard Review

Total metrics for the Process & Training Lead and Process & Training Associate roles are reviewed during the Scorecard Review. The purpose of this component is to **review our collective performance as a team** in terms of efficiency. **Individual performance metrics** are reviewed during your weekly 1:1 with your Process & Training Lead.

Learn more about the EOS Scorecard **in this subject.**

📅 Rock Review

Quarterly Rocks are **quarterly goals** established by the team. A Quarterly Rock is assigned to a team member in any role, and during the Rock Review of each Level 10 Meeting, **a brief update** is provided on the status of each Quarterly Rock that is still in progress.

Learn more about Quarterly Rocks **here.**

👤 Customer/Employee Headlines

During this portion of the meeting, the CEO will provide an update regarding customer/employee headlines. This includes **new deals and projects** in the works and the status of new hires or the need for additional employees.

📋 To-Do List

To-Do List items are **tasks that can be done within a week (before** the next Level 10 Meeting). Based on interest and availability, these are collaboratively assigned during Level 10 Meetings to either Process & Training Leads or Associates. To-Do List tasks are **in addition** to your current client project workload.

📌 If you have been assigned a To-Do List item, come to the following Level 10 Meeting **prepared to provide an update.**

⚠️ Identify, Discuss, Solve (IDS)

The most significant portion of a Level 10 Meeting is spent on IDS. During this time, the team 👀 **identifies current issues** faced by Great Lakes Advisory. These can be issues of any kind, from client-facing to project-based to internal issues. Time is spent as a team collaboratively **discussing the issues** and **creating a solution.** ✅

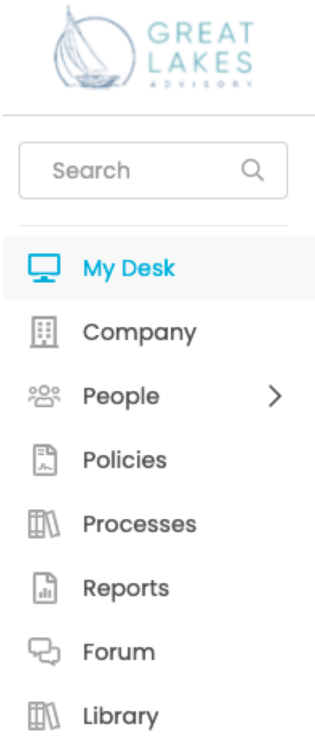
📊 Conclude & Rating

At the end of the meeting, the To-Do List is recapped, so team members are aware of their upcoming To-Do List items.

The Level 10 Meeting ends with **each team member rating the meeting on a scale of 1-10.** (10 being the highest and 1 being the lowest). The rating is determined based on the **overall quality and efficiency** of the meeting. Once all team members share their ratings, an average rating is determined and recorded for the meeting. 📝

Trainual Expectations (My Desk)

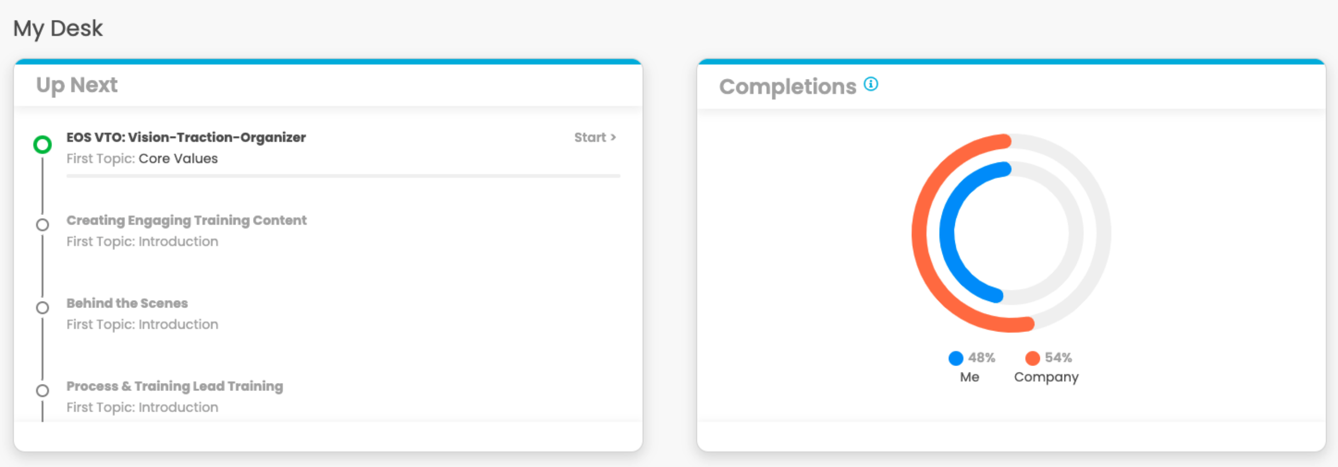
Even after you completed training as part of your onboarding process with Great Lakes Advisory, it is still important to check the **"My Desk" section of Trainual** for new training assignments.



We are always looking to **refine and improve our processes,** ✨ which can result in new or updated training for our employees.

👇 The **"Up Next"** section of Trainual's "My Desk" area will let you know if there are any subjects you have left to complete, and the **"Completions"** section will show your **training completion progress** in comparison to the rest of the company.

The goal is for the "Up Next" section to have no remaining items, with a **100% completion rate.** 💯


My Desk
Up Next
EOS VTO: Vision-Traction-Organizer
Start >
First Topic: Core Values
Creating Engaging Training Content
First Topic: Introduction
Behind the Scenes
First Topic: Introduction
Process & Training Lead Training
First Topic: Introduction
Completions
48%
Me
54%
Company

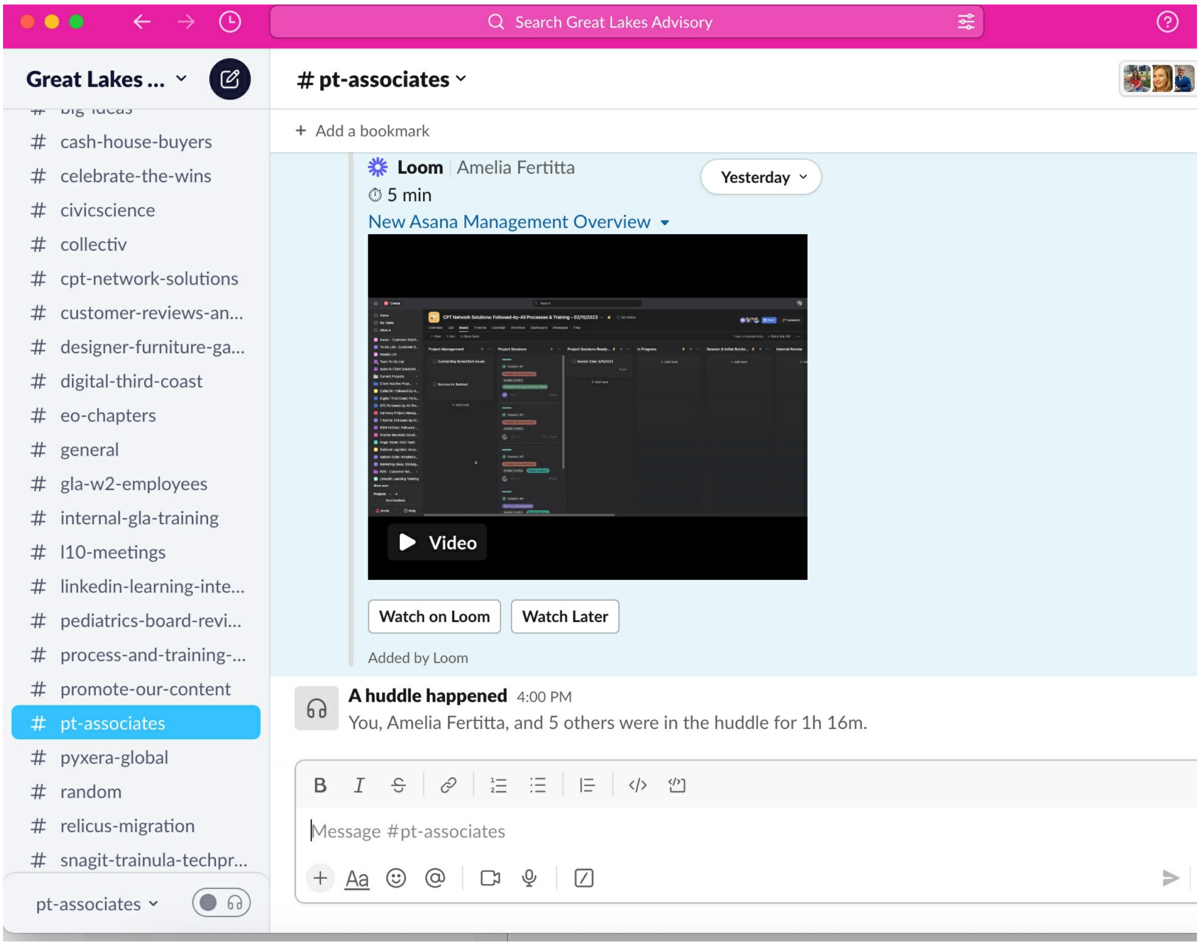
Sometimes projects and your work capacity **do not** line up.😳

When this happens, it is still the **associate's responsibility** to make sure all projects get completed by the deadline.📅

Ask your teammates for help!

Everyone at GLA is more than willing to help if they can!🥰

To do this, first, send a **Slack message** in the **PT Associates Channel** asking for help.💬



In your message, make sure you **include** the **scope of work, estimated hours required for completion, and the project deadline.**

Now, complete the ["Help Me"]() template to guide the associate helping you on the project. ✅

⚠️ If none of the other associates have the capacity to help you, reach out to your **lead** with your concerns **as soon as possbile.**⚠️

Unfortunately, life **emergencies** happen and **can't be avoided.**🙁

We **understand emergencies happen**, and the last thing you have on your mind is your projects.

In the case of an emergency, **notify your lead through Slack.** 💬

If you are out for more than four days, schedule 📅 a **touch-base meeting** with your lead on the day of your return.

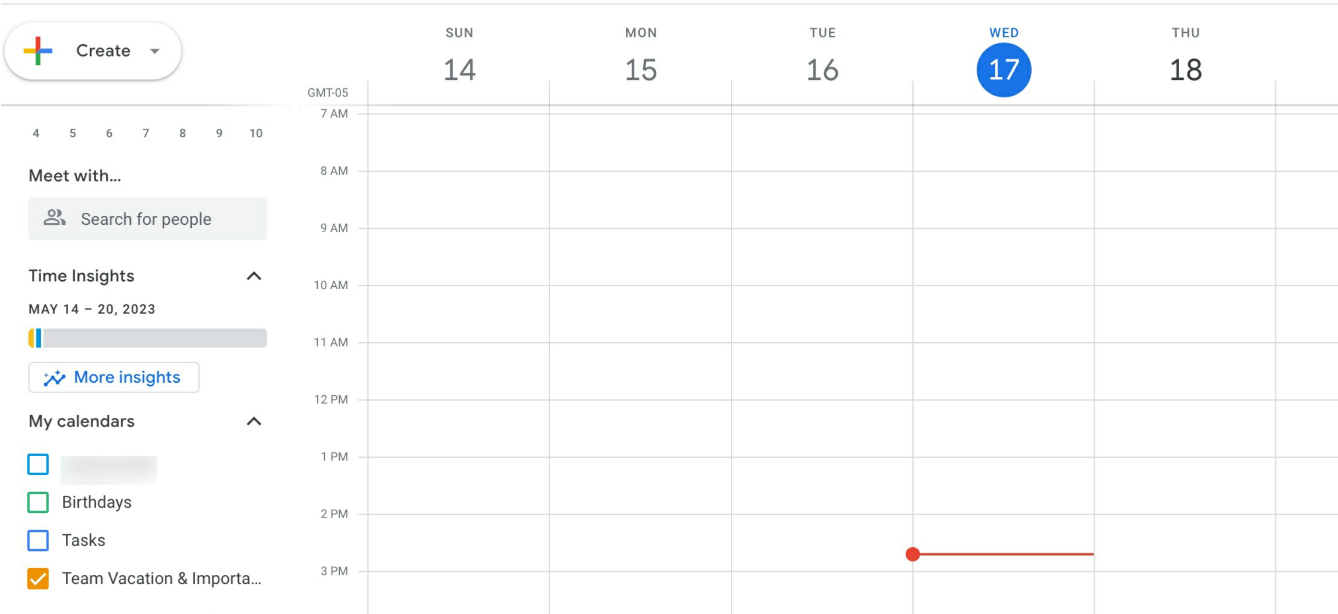
Going on vacation?

Taking a day off?

Enjoy your Time!

Before you go, let your lead know of any upcoming days you need off, **as soon as possible.**

Make sure to put your out-of-office days in the **Google Calendar "Team Vacations and Important Dates."**



If you are going to be **gone 4 days or more**, schedule 📆 a **touch-base meeting** with your lead for the day of your return.

Don't forget to request for time off in **Gusto** and Create and assign a [Sub Plan] for any projects that need to be taken care of when you are gone. ✅

Great Lakes Advisory offers **customized process and training solutions** for our clients. Our ultimate goal is to help our clients **standardize their training and processes** so they can scale their businesses.

As a Process and Training Associate, it is important to **familiarize yourself** with our different solution offerings, as you will document training for clients following the expectations within each offering. 📝

📌 The **Our Solution Overview subject** also contains a wealth of information describing our solution offerings.

The **WHY** behind Great Lakes Advisory's training documentation process is built on three principles:

#1 Tell Them Why 💬

#2 Intentionally Infuse Media 🎬

#3 Assess Always 📋

You will learn more about each of these principles later in the **Design Matters Training.**

Customer Expectations

When choosing Great Lakes Advisory for their process and training needs, our customers are expecting training that is **fun and engaging,** as well as **concise and easy to understand.**

They are also expecting their processes to be **documented efficiently, informatively,** and with **great detail.**

Optimization Levels

Optimization levels are the amount of **graphics** 🦄 and **emojis** 🤗 embedded in the training.

Clients are able to **select the level of optimization** ✅ they would like included in their training.

Our training is built on the principle that including **eye-catching** 👀 **visuals** helps to increase learner engagement😊 .

However, we understand that clients may already have preferences for the training format in mind, which **may** ✅ **or may not** ❌ include our usual optimization features.

Clients 🙂 are given the option to choose between three optimization levels: **High, Medium, or Low.** The Process & Training Lead will show examples of each level in order for the client to make their decision. 🤔

Click each optimization type to see it in action:

For [High Optimization](), Include:

- Lots of Emojis
- Gifs
- Relevant Memes
- Bolding of Important Words

For [Medium Optimization](), Include:

- Occasional Emojis

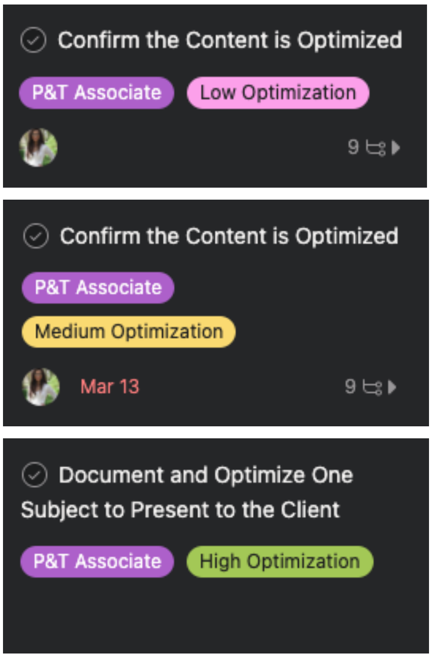
- Less Frequent Gifs
- Relevant Memes
- Bolding of Important Words

For Low Optimization, Include:

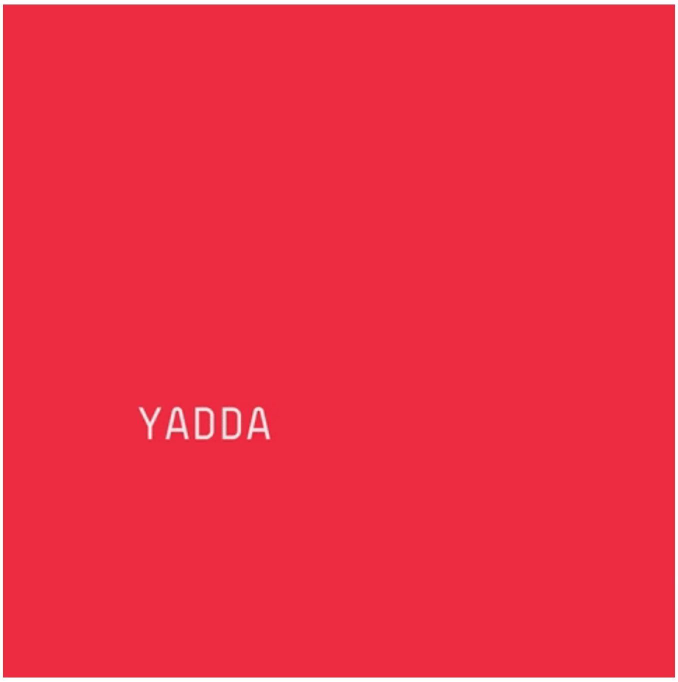
- Few Emojis
- More serious Gifs
- Bolding of Important Words
- Stock photos (Can be included to break up the text)

When working on a build-out for a client, it is **important** ⭐ to know which optimization level they have selected so the training can be developed **with their expectations in mind.** 👍

The **Asana tasks for the build-out** 🧱 will be labeled with the optimization level selected by the client:



Our clients👱 have **varying fields**, and with those fields comes a **variety** of **jargon.**🗣️



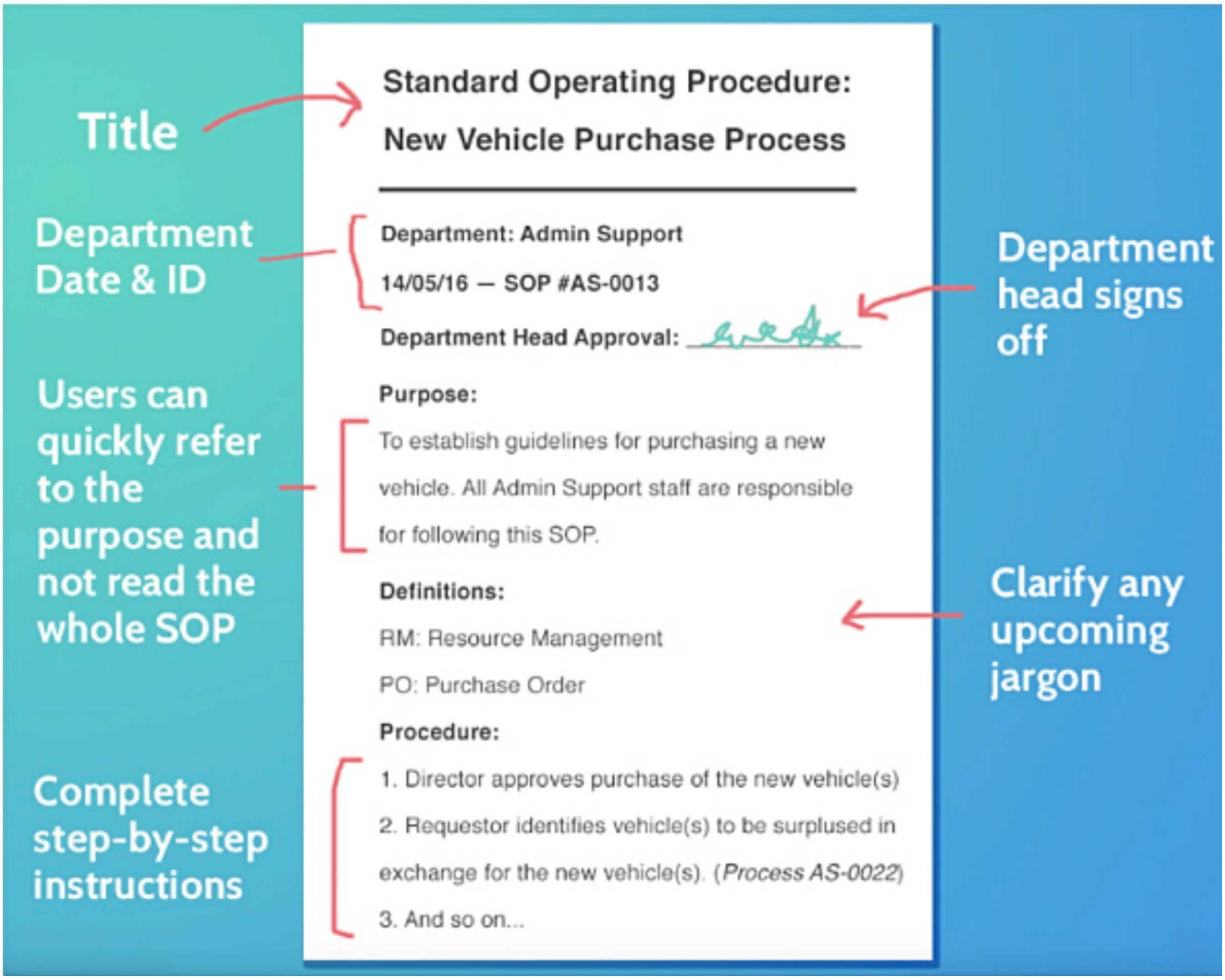
When writing ✏️ training documents or SOPs for a client, **take notes**📝 on the **specific vocabulary words** and **vernacular**👂 used to explain the process.

Learn the **terminology** and be **consistent** 🔄 when using it.

Some clients👱 have certain **language preferences**. ✅

Know the client and **tailor** your **word choice** 🗣️ **accordingly**.

At Great Lakes Advisory, we also **help clients write standard operating procedures (SOPs)** for the processes that occur within their business. 📄



As a Process & Training Associate, writing standard operating procedures for processes you have documented for a client **may be part** of an overall training build-out.

We will review SOPs and how to effectively create them in the upcoming training " **Creating Engaging Training Content**."