THE PERFORM GUIDE

Perform

SELF-LEADERSHIP

Know how your people work, and help every one of them grow.



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AT A GLANCE

Why Perform

Know how your people work, and help every one of them grow.

THE CHALLENGE

Performance conversations too often start from memory, and development plans are rarely about the person in front of you.

WHAT COACHA DOES

Perform gives every person a clear, private picture of how they work and where their energy goes, then links each result to practical next steps and to the conversation with their team leader.

WHAT CHANGES

- **A shared language for strengths and working styles**
- **A clear next step for every person**
- **One record of every performance conversation**

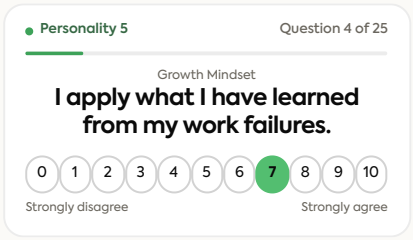
IN PERFORM

Personality 5

The five traits that shape how each person works, and what to do with them.

25 statements, about five minutes

Their own results are theirs alone.





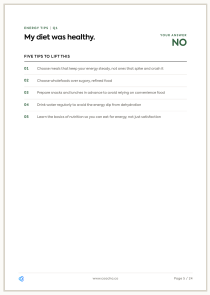
Energy and Time

A monthly check on the habits that protect energy and focus.

20 yes or no questions, a few minutes a month

Their results and trend are theirs alone.



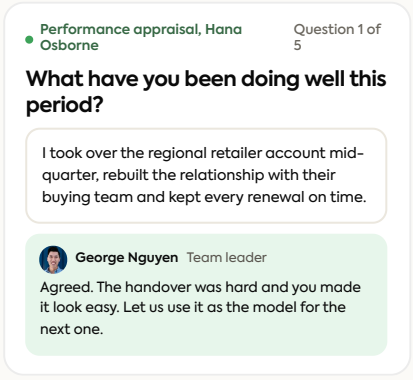


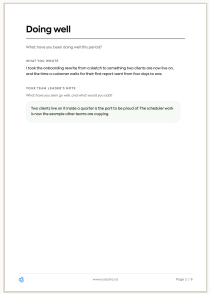
Performance appraisals

Reviews written by both people in them, ending in an agreed next step.

Five questions, written by both people

The person writes first, their team leader responds, HR keeps the record.





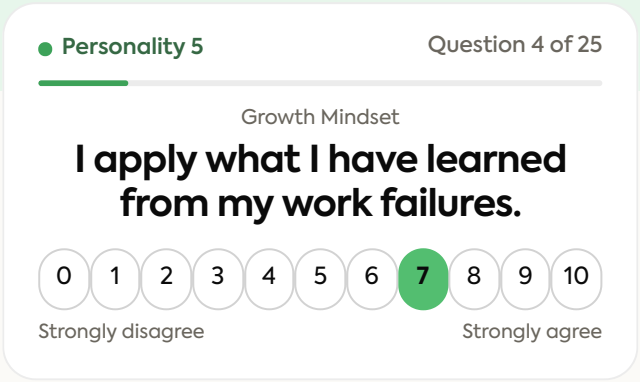
ASSESSMENT

Personality 5

The five traits that shape how somebody shows up at work.

Personality 5 measures the five traits that shape how somebody shows up at work. People see their profile, how it has moved since last time, and practical resources for every trait.

Questions	25 statements, each rated 0 to 10
Time	About 5 minutes, on any device
Answered by	The person, about themselves
Read by	Only the person. The organisation sees averages
Development	A module for each of the 25 questions, read in the report and in the library



One statement at a time, rated 0 to 10, on any device.

WHAT CHANGES

- **A shared language for strengths and working styles**
- **A clear growth area for every person, with ideas to act on**
- **Progress people can see from one round to the next**

WHAT IT ASKS

Five traits, five statements each.

Every statement is rated from 0 (strongly disagree) to 10 (strongly agree). Traits are averaged and ranked, and combined into four career snapshots.

Growth Mindset

The belief that we can develop by effort, learning, and persistence. The default is to embrace opportunities and challenges.

01 I seek feedback on how to do my job better

02 I have a learning plan for my job for the next 12 months

03 I welcome new opportunities at work

04 I apply what I have learned from my work failures

05 I set myself challenging work goals

Conscientiousness

Includes being responsible, organised, and on-time. A strong work ethic is accompanied by planning and accuracy.

06 I complete my work on time

07 I complete my work at a high standard

08 I help our customers have an excellent experience

09 I go above and beyond the work expected of me

10 I am organised at work

Energy

Means having the will and stamina to excel. This integrates ambition, assertiveness, and confidence.

11 I have enough physical energy to excel in my job

12 I am persuasive in meetings

13 I seek opportunities to be a leader at work

14 I am confident when I deal with customers

15 I am ambitious in my job

Generosity

Elevates team morale. Acts include helping colleagues feel welcome, deal with setbacks, and being connected to networks.

16 I connect colleagues to my network of allies

17 I help junior colleagues

18 I help new colleagues to feel welcome

19 I help colleagues when they have significant setbacks

20 I positively contribute to team morale

Emotional Agility

Helps us deal with uncertainty, unpleasant people, and setbacks. Emotional self-control helps us to adapt.

21 I deal effectively with unpleasant people in my job

22 I cope well with uncertainty at work

23 I am resilient to setbacks at work

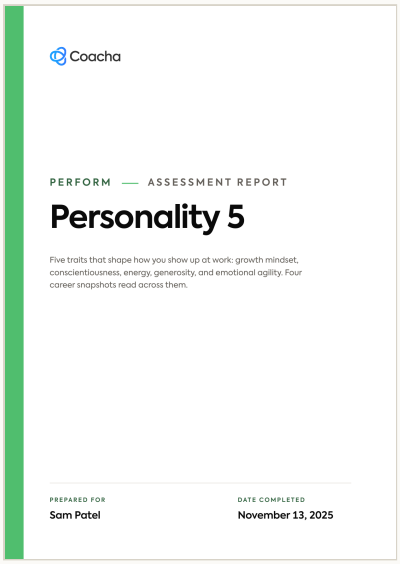
24 I display emotional self-control at work

25 My future career success will mostly depend on my effort

THE REPORT

A report the person keeps.

A designed report on screen and as a PDF: the profile first, then a page of development resources for every one of the 25 answers.


Coacha

PERFORM — ASSESSMENT REPORT

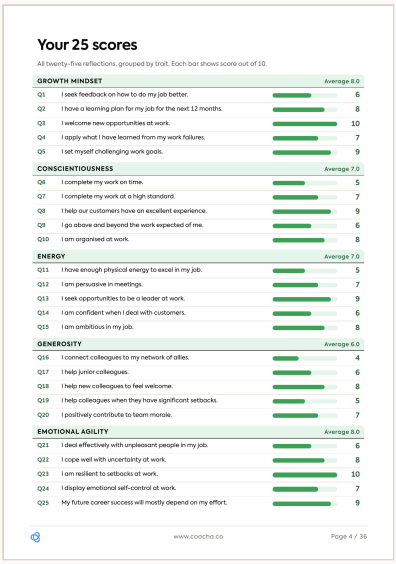
Personality 5

Five traits that shape how you show up at work: growth mindset, conscientiousness, energy, generosity, and emotional agility. Four career snapshots read across them.

PREPARED FOR
Sam Patel

DATE COMPLETED
November 13, 2025

Cover
The person's own report.

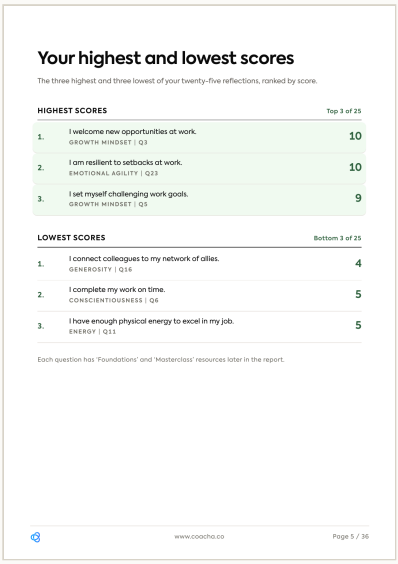

Your 25 scores

All twenty-five reflections, grouped by trait. Each bar shows score out of 10.

GROWTH MINDSET		Average 8.0
Q1	I seek feedback on how to do my job better.	6
Q2	I have a learning plan for my job for the next 12 months.	8
Q3	I welcome new opportunities at work.	10
Q4	I apply what I have learned from my work failures.	7
Q5	I set myself challenging work goals.	9
CONSCIENTIOUSNESS		Average 7.0
Q6	I complete my work on time.	5
Q7	I complete my work at a high standard.	7
Q8	I help our customers have an excellent experience.	9
Q9	I go above and beyond the work expected of me.	6
Q10	I am organised at work.	8
ENERGY		Average 7.0
Q11	I have enough physical energy to excel in my job.	5
Q12	I am persuasive in meetings.	7
Q13	I seek opportunities to be a leader at work.	9
Q14	I am confident when I deal with customers.	6
Q15	I am ambitious in my job.	8
GENEROSITY		Average 6.0
Q16	I connect colleagues to my network of allies.	4
Q17	I help junior colleagues.	6
Q18	I help new colleagues to feel welcome.	8
Q19	I help colleagues when they have significant setbacks.	5
Q20	I positively contribute to team morale.	7
EMOTIONAL AGILITY		Average 8.0
Q21	I deal effectively with unpleasant people in my job.	6
Q22	I cope well with uncertainty at work.	8
Q23	I am resilient to setbacks at work.	10
Q24	I display emotional self-control at work.	7
Q25	My future career success will mostly depend on my effort.	9

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All 25 scores
Grouped by trait, with each average.


Your highest and lowest scores

The three highest and three lowest of your twenty-five reflections, ranked by score.

HIGHEST SCORES — Top 3 of 25

1.	I welcome new opportunities at work. GROWTH MINDSET | Q3	10
2.	I am resilient to setbacks at work. EMOTIONAL AGILITY | Q23	10
3.	I set myself challenging work goals. GROWTH MINDSET | Q5	9

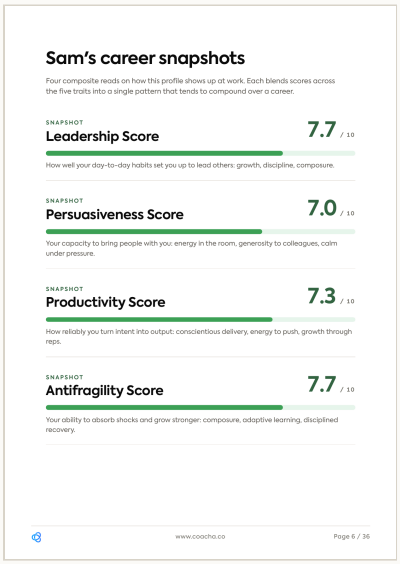
LOWEST SCORES — Bottom 3 of 25

1.	I connect colleagues to my network of allies. GENEROSITY | Q16	4
2.	I complete my work on time. CONSCIENTIOUSNESS | Q6	5
3.	I have enough physical energy to excel in my job. ENERGY | Q11	5

Each question has 'Foundations' and 'Masterclass' resources later in the report.

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Highest and lowest
The three strongest and the three to work on.


Sam's career snapshots

Four composite reads on how this profile shows up at work. Each blends scores across the five traits into a single pattern that tends to compound over a career.

SNAPSHOT
Leadership Score — 7.7 / 10
How well your day-to-day habits set you up to lead others: growth, discipline, composure.

SNAPSHOT
Persuasiveness Score — 7.0 / 10
Your capacity to bring people with you: energy in the room, generosity to colleagues, calm under pressure.

SNAPSHOT
Productivity Score — 7.3 / 10
How reliably you turn intent into output: conscientious delivery, energy to push, growth through reps.

SNAPSHOT
Antifragility Score — 7.7 / 10
Your ability to absorb shocks and grow stronger: composure, adaptive learning, disciplined recovery.

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Career snapshots
Four reads across a career.


DEVELOPMENTAL RESOURCES — QUESTIONS 1 TO 5

Growth Mindset score

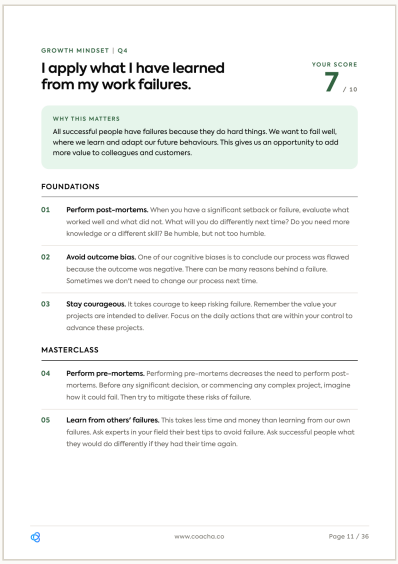
8.0 OUT OF 10
average of five reflections

A growth mindset means we believe our skills can be developed through effort, feedback, and learning. We seek challenge, treat failure as data, and stretch our goals over time.

WHAT'S NEXT
The five growth mindset questions follow on the next pages. Each page includes three Foundations and two Masterclass tips for that question.

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A trait in focus
Its score, then its five questions.


GROWTH MINDSET | Q4

I apply what I have learned from my work failures.

YOUR SCORE 7 / 10

WHY THIS MATTERS
All successful people have failures because they do hard things. We want to fail well, where we learn and adapt our future behaviours. This gives us an opportunity to add more value to colleagues and customers.

FOUNDATIONS

01 **Perform post-mortems.** When you have a significant setback or failure, evaluate what worked well and what did not. What will you do differently next time? Do you need more knowledge or a different skill? Be humble, but not too humble.

02 **Avoid outcome bias.** One of our cognitive biases is to conclude our process was flawed because the outcome was negative. There can be many reasons behind a failure. Sometimes we don't need to change our process next time.

03 **Stay courageous.** It takes courage to keep risking failure. Remember the value your projects are intended to deliver. Focus on the daily actions that are within your control to advance these projects.

MASTERCLASS

04 **Perform pre-mortems.** Performing pre-mortems decreases the need to perform post-mortems. Before any significant decision, or commencing any complex project, imagine how it could fail. Then try to mitigate these risks of failure.

05 **Learn from others' failures.** This takes less time and money than learning from our own failures. Ask experts in your field their best tips to avoid failure. Ask successful people what they would do differently if they had their time again.

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A page for every question
Why it matters, then five tips.

DEVELOPMENT LIBRARY

All 25 modules, every tip in full.

Every Personality 5 module as people read it: why the question matters, then each Foundations and Masterclass tip, in full.

Growth Mindset

5 questions

Q1 I seek feedback on how to do my job better

Feedback encourages us to do more of what's working and to leverage our strengths. It helps identify where we need to improve. Without feedback, we may not fully appreciate our strengths and weaknesses. Effective feedback provides insights on how to do better.

FOUNDATIONS

01 **Invite real-time feedback.** We learn and adapt faster when we receive frequent, timely feedback. This is important when we commence new roles. Ask managers for feedback after you participate in significant meetings and projects.

02 **Avoid magnification and minimisation.** Two of our cognitive biases are to magnify negative feedback and minimise positive feedback. Treat negative feedback as an opportunity to adapt. Pause and appreciate positive feedback, you earned it.

03 **Prepare for formal feedback.** The most important preparation for performance appraisals is to have an open mind. This encourages feedback givers to be honest. Self-reflection before appraisals leads to us asking better questions.

MASTERCLASS

04 **Have independent mentors.** Nurture a circle of mentors inside and outside your organisation. Seek their counsel on your career goals. Test your big ideas with them. Their feedback can change your perspective and accelerate your progress.

05 **Track your performance.** People who achieve excellence track their performance against a range of process and outcome goals. Develop metrics and systems to provide you regular feedback. You don't need to wait for feedback from others.

Growth Mindset, continued

5 questions

Q2 I have a learning plan for my job for the next 12 months

A focused learning plan helps to future proof our careers. We stay relevant to colleagues and customers when we add more value by learning new skills. Consistent learning across a career, compounds to us becoming experts. Learning is also enjoyable.

FOUNDATIONS

01 **Dedicate time each week to learn.** This could be in transit, on the weekend, or in a quiet part of your work week. Podcasts and audio books enable us to walk and learn. AI tools summarise for us. Schedule and defend your learning time.

02 **Seek your organisation's resources.** Most organisations have a variety of training programmes and subscriptions. Older colleagues have corporate memory and have experienced market cycles. Younger colleagues can reverse mentor on technology.

03 **Pursue deep and wide learning.** Deep learning helps us to be domain experts. Specialised knowledge is always valuable. Pursuing wide learning gives us a range of insights that can be combined in different ways. Range encourages innovation.

MASTERCLASS

04 **Teach what you know.** Teaching leverages our learning and expands our relationships. It encourages us to clarify our thinking. We can invite our audience to test our ideas and processes. This refines and renews our work.

05 **Become a thought curator.** Few people are genuine thought leaders. All of us can be thought curators. We can synthesise industry knowledge and explain new trends. Conferences, white papers, and LinkedIn are excellent ways to share our learning.

Growth Mindset, continued

5 questions

Q3 I welcome new opportunities at work

Welcoming new opportunities leads to increased skills, self-belief, and innovation. Our positivity has a ripple effect. It indicates to our colleagues we are committed to personal growth and the progress of the organisation.

FOUNDATIONS

01 **Have a default position of 'yes'.** Many people feel threatened by change and reflexively say, 'no'. A solution-focussed approach first explores how the opportunity could be a success. Then explores potential obstacles and problems.

02 **Recall when you successfully embraced opportunities.** There are many occasions each of us has adapted to change and learned new things. Recall your past victories. This increases your self-belief.

03 **Enlist help.** Colleagues, customers, and suppliers have experience to help us with new opportunities. Most people are generous with their insights. Enlist early the experience and insights of others when a project is novel to you.

MASTERCLASS

04 **Be a champion of change.** When you are committed to a new opportunity, advocate its benefits to colleagues. You can win allies for your projects. Your enthusiasm and tenacity can sustain momentum for desired changes.

05 **Focus on high value projects.** Welcoming new opportunities does not mean pursuing any opportunity. Be selective. Commit your finite time to opportunities that can deliver significant value to your organisation.

Q4 I apply what I have learned from my work failures

All successful people have failures because they do hard things. We want to fail well, where we learn and adapt our future behaviours. This gives us an opportunity to add more value to colleagues and customers.

FOUNDATIONS

01 **Perform post-mortems.** When you have a significant setback or failure, evaluate what worked well and what did not. What will you do differently next time? Do you need more knowledge or a different skill? Be humble, but not too humble.

Growth Mindset, continued

5 questions

Q4, continued

02 **Avoid outcome bias.** One of our cognitive biases is to conclude our process was flawed because the outcome was negative. There can be many reasons behind a failure. Sometimes we don't need to change our process next time.

03 **Stay courageous.** It takes courage to keep risking failure. Remember the value your projects are intended to deliver. Focus on the daily actions that are within your control to advance these projects.

MASTERCLASS

04 **Perform pre-mortems.** Performing pre-mortems decreases the need to perform post-mortems. Before any significant decision, or commencing any complex project, imagine how it could fail. Then try to mitigate these risks of failure.

05 **Learn from others' failures.** This takes less time and money than learning from our own failures. Ask experts in your field their best tips to avoid failure. Ask successful people what they would do differently if they had their time again.

Q5 I set myself challenging work goals

Colleagues and competitors evolve. To keep up, we need to challenge ourselves to improve. Challenging work goals engage us. They provide us the opportunity to leverage our existing strengths and develop new ones. Adapting to challenge keeps our minds young.

FOUNDATIONS

01 **Have ambitious outcome goals.** What extra value do you want to create for colleagues and customers? What projects would make a difference? High performers are bold and ambitious.

02 **Have disciplined process goals.** Disciplined daily process goals deliver ambitious, long-term, outcome goals. Chunk big goals into smaller, doable actions. Celebrate good process. This is motivating as it recognises our progress.

03 **Stretch and re-stretch.** Once we have mastered tasks, it can be tempting to go into cruise mode. This leads to career plateau. To remain a high performer, we need to keep stretching ourselves. This is a more engaging way to work.

Growth Mindset, continued

5 questions

Q5, continued

MASTERCLASS

04 **Seek allies with the same mission.** Which colleagues might share your challenging work goals? How could you collaborate better with them? The more allies we have on our mission increases our probability of success. 1 + 1 + 1 = 7.

05 **Find flow.** Flow is a peak state in our work. It's when we are deeply engaged, using our strengths on challenging tasks, and barely noticing the passing of time. Flow is an emotional state where we enjoy the journey to achieving our goals.

Conscientiousness

5 questions

Q6 I complete my work on time

Completing work on time demonstrates to colleagues and customers that we are reliable. Reliability builds trust. Completing on time means that we don't delay the work of others. We also get to move on to other interesting projects and tasks.

FOUNDATIONS

01 **Avoid the planning fallacy.** This is the cognitive bias where we tend to be too optimistic about the costs, risks, and time to complete tasks. We tend to adopt best-case scenarios. Strive to be realistic. Also estimate worst and central cases.

02 **Dedicate time in your calendar.** Our core time management involves capturing tasks and identifying when to do them. Use a simple and dependable system to do this. Then defend this time from competing requests.

03 **Start projects early.** It is useful to start brainstorming projects as soon as we receive them. We can think while the briefing information is fresh. This builds momentum. Starting early protects us against unexpected demands of our time.

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04 **Complete projects early.** Delivering projects early delights people. It shows we have prioritised their needs and demonstrates our productivity. These lead to us being invited to perform other high-value projects.

Conscientiousness, continued

5 questions

Q6, continued

05 **Say 'no' to overload.** If we are good at our jobs, we attract more tasks than we have time to perform. We sometimes need to politely say 'no' to colleagues and customers. Otherwise, we will struggle to complete existing commitments on time.

Q7 I complete my work at a high standard

Completing work at a high standard shows colleagues and customers that we care. This leads to repeat business. We feel competent and proud when we deliver quality work. Delivering high standards means that we do not waste time and money by fixing work.

FOUNDATIONS

01 **Understand the required standard.** If in doubt, clarify with your manager what standards they expect for tasks and projects. Do this as early as possible. It will enhance your productivity and encourage positive emotions.

02 **Don't reinvent the wheel.** Use existing resources within your organisation. Re-purpose high quality marketing documents, contracts, and finance tools. Ask colleagues to share their insights and experience. Adapt with AI tools.

03 **Allow time to enhance work.** Most of our initial efforts can be improved. Returning to a project after a break leads to renewed creativity. Can the work be simplified? Do the parts connect well? Is it persuasive? Aim for excellence, not perfection.

MASTERCLASS

04 **Benchmark to elite performers.** Observe what elite performers do in your organisation and industry. How consistent are they? Model their approach. And consider if there is anything that you can do better than them.

05 **Select valuable projects.** Long-term career success depends on where we focus our energy. Try to solve difficult problems. Know what goals are important to your organisation. We want to be excellent at projects that matter.

Conscientiousness, continued

5 questions

Q8 I help our customers have an excellent experience

Customers who have an excellent experience are more likely to refer other customers, buy more from us, and deal on the price and terms we want. Think of the potential lifetime revenue of a customer. Providing them an excellent experience is a winning strategy.

FOUNDATIONS

01 **Commit to customer service alpha.** Customer service beta is what the market delivers on average. We want to exceed it and deliver alpha. Can we be faster and more accurate than the competition? Can we be friendlier?

02 **Listen well.** Part of our value proposition to customers is the psychological experience they receive. Our customers want to feel heard. We can be excellent listeners no matter what the problem.

03 **Be solution-focused.** Have a default position with customers of, 'let's see if we can deliver what you want.' It can be quicker to meet a request than debate why it's a 'no'. Customers love a can-do attitude.

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04 **Be client obsessed.** Customers champion us when we champion them. Great organisations are obsessed by improving customer experience. What else can you do to delight customers this week? And in the next year?

05 **Be an ambassador.** Every time you speak with a customer, you bring the whole of your organisation with you. Curate resources that help your customers succeed. This can lead to cross-selling opportunities.

Q9 I go above and beyond the work expected of me

People who exceed expectations typically get promoted faster, paid more, and are invited to work on interesting projects. High performers deliver more value. Colleagues and customers want to work with us when we deliver exceptional value.

FOUNDATIONS

01 **Increase intensity.** Some of us can work harder. This could include longer hours. The easiest change for most people is to increase intensity. Reducing distractions, pulsing work in thirty-minute blocks, and having project sprints increases intensity.

Conscientiousness, continued

5 questions

Q9, continued

02 **Work smarter.** All of us can work smarter. Other people have great ideas and processes we can adapt to our work. Technology will always evolve. We surprise and benefit colleagues when we embrace smarter ways of working.

03 **Drive the final ten per cent.** Completing the final part of a project can be frustrating. There are often delays and everyone is ready to move on. If you retain focus and energy to drive the project to completion, you will be appreciated.

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04 **Challenge your team.** You can encourage team members to work at a higher level. Collective endeavour is powerful. Help your teammates to reach their potential. Contribute to a culture of excellence.

05 **Be pragmatic.** Your time is finite. Some tasks and projects can be completed at a 'good enough' level. Some customers won't deliver significant revenue. Choose when to go above and beyond what is expected of you.

Q10 I am organised at work

Being organised is core to being productive. Having reliable systems to prioritise effort, run projects, and manage communication helps us excel at work. Being organised also helps us remain calm when we are busy.

FOUNDATIONS

01 **Task capture.** Have a system to identify and store all the tasks that you need to perform. It should be accessible wherever you are. Knowing what we need to do is the first step of being organised.

02 **Task prioritisation.** At the beginning of each workday, know what tasks you want to perform. Prioritise tasks that are urgent and important. Make time each week to progress long-term projects. Align your efforts with the big goals of your team.

03 **Embrace AI tools.** Each month there are AI advances in how we can manage our tasks and projects. We stay relevant and leverage our time by learning AI tools. Subscribe yourself if your organisation won't.

MASTERCLASS

04 **Eliminate low value tasks.** Redundant tasks, inefficient meetings, and busy work lower morale and productivity. Identify what does not serve your team. Encourage colleagues to join you in eliminating low value tasks from your workstreams.

Conscientiousness, continued

5 questions

Q10, continued

05 **Consult high performers.** Ask high-performing colleagues what they do to stay organised. Ask them what they would apply in your job. Ask high-performers in your industry what productivity hacks work for them.

Energy

5 questions

Q11 I have enough physical energy to excel in my job

We want to work with high energy people. And we want to be perceived as a high energy person. To excel long-term in our careers we need to get enough sleep, eat well, and exercise. These are the foundations of being a corporate athlete.

FOUNDATIONS

01 **Get enough sleep.** Most of us need at least 6.5 hours of sleep to think at our best. Set a regular time to go to bed. Have the room as dark as you can. If you struggle to sleep, stay in bed and appreciate the rest. Don't dwell on a bad night's sleep.

02 **Eat well.** There is consensus amongst dieticians that we should limit sugary, refined food. A nutritious diet helps us to avoid energy cliffs in our workday. Adequate water also helps us to perform at our best.

03 **Exercise smart.** Regular aerobic training and lifting weights help us to stay healthy. It also makes us look energetic. Physical fitness enhances our mental fitness. We can focus harder for longer.

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04 **Seek calmness.** When we are stressed at work, we want to get back in the zone of high performance. Deep breathing, meditation, or music can calm us. We can also think, 'it's my choice to do this difficult thing.'

05 **A system of habits.** Optimising our physical energy is made easier when we: pack our gym clothes the night before, stock our work fridge with nutritious food, set our alarm for a time to go to bed. We prepare for success.

Energy, continued

5 questions

Q12 I am persuasive in meetings

Many of us will have more than 20,000 meetings in our career. How we communicate in these meetings will have a significant impact on how we are promoted and paid. We want our ideas to be heard. We need to be assertive in significant meetings.

FOUNDATIONS

01 **Prepare.** Before significant meetings, we want to prepare with the information we need. We also want to be calm and focused. Take 5 minutes to get in-the-zone by deep breathing, listening to music, or looking at a picture of a loved one.

02 **Persuade with your voice and body language.** We better project our voice when we sit with our sternum up. This posture also makes us look attentive. Maintain open body language, slowly nod your head when you listen, smile sometimes.

03 **Time your comments.** In a discussion, listen so that others feel like you have understood their opinions. Then speak. Don't rush your words. Present the 2 or 3 points that are most persuasive. Return to your points if you are interrupted.

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04 **Deepen alliances.** Understand what matters to the other people in the meeting. What is at stake for them? How can you lower negative emotions and promote a sense of collective endeavour. Negotiate as if you will work together for 10 years.

05 **Be statesperson-like.** Commit to getting the right outcome, not being right. Defend the airtime of quieter voices, circle back to people who have been spoken over, and acknowledge good points that are contrary to yours.

Q13 I seek opportunities to be a leader at work

Leading people is a privilege. We can create significant value for colleagues and customers by leading well. If you want to lead, you can demonstrate this by how you interact with your colleagues. You can also explicitly ask for increased leadership responsibilities.

FOUNDATIONS

01 **Do difficult things.** Colleagues respect us when we try to solve difficult problems. Self-leadership means we embrace the difficult. What would add significant value to your team? Enlist your colleagues' support so it's a win for all of you.

Energy, continued

5 questions

Q13, continued

02 **Notice.** Sometimes we are so busy with our own tasks that we don't notice if a colleague is struggling. Central to mindful leadership is noticing. Could any of your team members benefit with some extra care?

03 **Manage moods.** Effective leaders help manage the mood of their teams. What is overall morale like in your team? You want the team to be motivated and hopeful. Good teams also balance confidence with humility.

MASTERCLASS

04 **Plan to be a better leader.** Leaders drive their learning plan. They absorb books and podcasts, engage coaches, and have a circle of mentors. What else could you learn from the leaders in your business? Ask for their insights.

05 **Ask for opportunities.** If you want more leadership opportunities, ask your managers for them. You don't need to wait until your formal performance review. Seek their advice on how and when you could progress as a leader.

Q14 I am confident when I deal with customers

We're more persuasive with customers when we're confident. Authentic confidence is based on offering valuable products and services. This type of confidence makes us trustworthy and likeable with customers.

FOUNDATIONS

01 **Be value-centred.** Before every significant meeting, know what value you want to provide the customer. Value includes being a trusted advisor. It includes creating a positive psychological experience such as being friendly and attentive.

02 **Slow down.** Confident people don't feel rushed to talk. They listen to customers without interruption. And when it's their time to talk, their voice pace is measured. Customers will dedicate time to us if they think we can add value.

03 **Write your big work achievements.** Self-confidence is earned when it's based on achievements. Reflecting on our achievements embeds them in our long-term memory. This helps us remain confident with customers when we have setbacks.

Energy, continued

5 questions

Q14, continued

MASTERCLASS

04 **Overcome contact reluctance.** Sometimes even the best salespeople procrastinate with contacting customers. A simple routine to overcome this: schedule contact times; focus on adding value; deep breathing; be friendly.

05 **Care but don't care too much.** We do not want to appear anxious or desperate with customers. Focus on and care about actions within your control. We can't control our customers' actions.

Q15 I am ambitious in my job

People can achieve great things when they are ambitious. This ambition could be to build a fantastic product, deliver customer service alpha, or become CEO. Nearly all senior leaders are ambitious. Ambition directs our energy and talent.

FOUNDATIONS

01 **Be bold.** Are you being bold enough with your job and career goals? Many of us can stretch ourselves further than we think. We can inject more energy. Ambition works when we are urgent with actions, and patient with results.

02 **Embrace power.** Power is neutral; it is what we do with it that matters. Some people will not seek a leadership role in case they are perceived as playing politics. It takes courage to lead and make difficult, ethical decisions.

03 **Manage your visibility.** People need to know our achievements. Some of us can be too humble. Share your progress with senior colleagues and seek their advice on how to do even better.

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04 **Compound your habits.** Positive actions repeated over decades deliver massive value. Our actions compound. Successful, ambitious people cultivate habits that serve them throughout their career.

05 **Collaborate.** Collaboration is a winning strategy for ambitious people. We can create outsized value with colleagues when we have a reputation for collaboration. We can do things faster when we are trusted.

Generosity

5 questions

Q16 I connect colleagues to my network of allies

Networks of allies help us to get our work done faster and better. They share their experience and facilitate resources. Allies also make our work more enjoyable. We assist our colleagues when we connect them to our network of allies.

FOUNDATIONS

01 **Build a powerful network.** We are more valuable to colleagues when our network is powerful. Networks that are deep with expertise and wide across job functions help us complete complex projects. Expand and renew your network.

02 **Provide value to your network.** Be prepared to add value first to members of your network. Understand what is important to them. Share articles, podcasts, and tools. Respond promptly if they seek your assistance. These deepen alliances.

03 **Act as a bridge.** Notice when a colleague might benefit by an introduction to your network. Ask your colleague if this would be useful. Make a proper introduction then allow your colleague and network contact to build a relationship.

MASTERCLASS

04 **Foster supernodes.** Supernodes are people in your network who are knowledgeable, well-connected, and willing to act as a bridge for you to their network. Foster relationships with people who could be supernodes for you.

05 **Seek reciprocity from your network.** Be assertive in asking for assistance from your network. When you are generous, it's reasonable to expect generosity in return. The people you want in your network understand this principle.

Q17 I help junior colleagues

Training and mentoring junior colleagues delivers significant benefit to your organisation. These colleagues leverage your effort, provide succession planning, and bring fresh ideas. People who help junior colleagues are perceived as leaders.

FOUNDATIONS

01 **Empathise.** Remember what it was like when you were a junior employee. What were your fears and hopes? What was the best way to help you quickly develop? Ask junior colleagues how you can best help them.

Generosity, continued

5 questions

Q17, continued

02 **Connect within your organisation.** You can assist junior colleagues to navigate your organisation. This may include introductions to key people, gaining access to the CRM, and explaining how promotions happen. Share your corporate memory.

03 **Connect within your industry.** You can curate useful experiences for your junior colleagues. Bring them to significant meetings with suppliers and customers. Bring them to conferences and events. Share useful articles.

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04 **Convene groups.** You may organise junior colleagues to meet and share ideas. This could be about a specific topic such as AI tools, cross-selling, or hiring interns. Such meetings are supportive and lead to peer or buddy coaching.

05 **Initiate reverse mentoring.** Seek the experiences of junior colleagues. What software tools are they using? What newsletters and podcasts are they consuming? This models humility and a growth mindset. We stay relevant by renewing our ideas.

Q18 I help new colleagues to feel welcome

Integrating new colleagues helps them deliver the value for which they were hired. Having them feel welcome builds trust, accelerates their engagement, and increases the probability they will stay. New colleagues may become valuable people in your network.

FOUNDATIONS

01 **Be friendly.** Being friendly to others prompts them to release oxytocin. This hormone predisposes them to trust us and reciprocate generosity. Friendliness makes others feel welcome. And can initiate a long-term, positive relationship.

02 **Connect them to key colleagues.** We all want to know how a workplace really works. Connect new joiners to the colleagues who make things happen. These colleagues could be in HR, IT, or Administration.

03 **Seek their insights.** We hire externally to expand knowledge, skills, and experience. Ask new colleagues about their insights. What industry trends excite or worry them? They will feel welcomed and valued.

Generosity, continued

5 questions

Q18, continued

MASTERCLASS

04 **Invite to significant meetings.** Colleagues feel important when we bring them to significant meetings with customers, suppliers, and candidates. Brief them before these meetings. Welcome their thoughts post-meeting.

05 **Seek feedback on your organisation.** New joiners to organisations bring fresh perspectives. After their first six weeks, seek their early thoughts on what your organisation does well and could do better. Seek the same about your team.

Q19 I help colleagues when they have significant setbacks

All of us have setbacks in work and broader life. Having colleagues who care about us makes significant setbacks easier to overcome. We show colleagues they matter to us when we offer to help them. This means we are more likely to be helped when we need it.

FOUNDATIONS

01 **Know your colleagues.** A large motivator for most workers is relatedness. We want to know others and be known by them. When we have invested time to know a colleague, we can notice subtle changes in their mood.

02 **Express care by words.** There are many ways we can express our support or concern for a colleague. Simple words work. We can say or write that we are thinking about them. Or that we are available to help if they would find it useful.

03 **Help by actions.** Generous actions are even better than generous words. When we know a colleague well, it is easier to match our assistance to their wants. We can perform acts that make a difference to them. This is an excellent form of empathy.

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04 **Empower.** We want to help people, not disempower them. Our job is to assist our colleague. We do not want to be paternalistic or seek to be their rescuer. We need to be humble and check-in that our assistance is still useful.

05 **Help yourself first.** There may be times when the whole team has a significant setback. On a plane we are told to put on our oxygen mask first before we help others. Our long-term generosity to others is aided by first helping ourselves.

Generosity, continued

5 questions

Q20 I positively contribute to team morale

People who are known as team players positively contribute to team morale. We can boost team confidence after a series of setbacks. We also can encourage humility if the team has become over-confident from success.

FOUNDATIONS

01 **Be a convenor.** High performing teams are built on shared experiences and common goals. Organise for your team to catch-up. Most team members enjoy spending creative and social time together. You can convene these times.

02 **Encourage confidence.** It is easy for teams to lose confidence after a series of setbacks. Focus yourself and the team on what's within your control. Remember what worked well in the past. Remember the value the team provides.

03 **Encourage humility.** It's easy for teams to become over-confident after a series of wins. Focus you and the team on strong process. Perform together a pre-mortem of what could go wrong. Appoint a Devil's advocate to challenge the team.

MASTERCLASS

04 **Enhance your social intelligence.** Social intelligence includes understanding the dynamics of groups and how best to interact. Team members will vary by personality and motivation. Increase your understanding of their differences.

05 **Share stories.** We can elevate team morale by the stories we share. Knowing the team's history of setbacks, successes, and characters helps. In good times and bad, humour is appreciated.

Emotional Agility

5 questions

Q21 I deal effectively with unpleasant people in my job

We want to effectively deal with diverse personalities and behaviours in the workplace. When people are being unpleasant, we don't want to waste time on negativity. Focus on what you can control then move on to more positive encounters.

FOUNDATIONS

01 **Listen and empathise.** People often positively respond if they feel they have been heard. We can acknowledge that a situation is frustrating or disappointing for someone. Patience and courtesy serve us.

Emotional Agility, continued

5 questions

Q21, continued

02 **Apologise if warranted.** Often the fastest way to de-escalate unpleasantness is to say sorry. Don't make excuses. Ask if there is anything you or your team could do to improve the situation. Commit to fixing what you can.

03 **Care but do not care too much.** Much of the time, the negative moods of others have little to do with you. It is not your job to rescue customers and colleagues from their negative moods. You have more valuable things to spend your time on.

MASTERCLASS

04 **Suggest better ways to work together.** We can outline to customers and colleagues how we prefer to work. This includes mutual, respectful communication. It is appropriate to set boundaries when people are rude to us.

05 **Convert new allies.** Unpleasant people often have small inner circles. If you can find a way to work with them, they may become very loyal to doing business with you. Your ability to be emotionally agile will win allies.

Q22 I cope well with uncertainty at work

We evolved to have a fight or flight response when we feel threatened. This response can be triggered by perceiving uncertainty in the workplace. Coping well with uncertainty means we can remain productive, collaborative, and happy.

FOUNDATIONS

01 **Defeat catastrophisation.** Many people assume the worst possible outcome when there is uncertainty. Assess the probability of the worst outcome happening. Recall when you have overcome bad outcomes. Re-evaluate your fears.

02 **Keep going.** Focus on continuing to add value. You do not want uncertainty to hijack your progress. Permit yourself to enjoy your projects. Your colleagues and customers will respect your tenacity.

03 **Be openminded.** Change can produce improvements and career opportunities. Being openminded and positive about the future is useful to your mental health. It also identifies you as someone who can lead.

Emotional Agility, continued

5 questions

Q22, continued

MASTERCLASS

04 **Help drive the agenda.** We don't need to be passive about uncertainty. We can plan. And contribute ideas on how the team and organisation can adapt to potential changes. This helps future proof the organisation and our career.

05 **Enjoy positive things outside work.** Strong relationships with family and friends provide us stability. This is a useful counterbalance to uncertainty associated with work. Maintaining relationships outside work provides us calmness at work.

Q23 I am resilient to setbacks at work

Being resilient to setbacks at work is essential to being a high performer. Resilience enables us to take smart risks. It helps us to continue with our projects while others may retreat. Resilience helps us to enjoy life and work.

FOUNDATIONS

01 **Focus on what is within your control.** We feel like we have agency when we act. We can use our strengths, advance our projects, and avoid rumination. Positive actions give us momentum to bounce back.

02 **Gain support from colleagues.** Let colleagues know what they can do to help when you have a setback. They can provide useful suggestions and help with our workload. Most colleagues enjoy feeling needed.

03 **Stay healthy.** Mental resilience is supported by physical resilience. Go to bed at a reasonable time. Eat nutritious food and drink enough water. Have short bursts of exercise if you are very busy. Walking meetings promote good decisions and health.

MASTERCLASS

04 **Help others.** We often feel better when we are in the service of others. Focusing on others distracts us from pessimism and catastrophisation. Helping colleagues provides us a range of positive emotions. It also demonstrates our leadership.

05 **Bounce forward.** It is good to bounce back from setbacks. It is great to bounce forward. This is when we learn from the setback and return more resourceful and competitive than before.

Emotional Agility, continued

5 questions

Q24 I display emotional self-control at work

Workplaces provoke uncomfortable feelings at times. Emotional self-control is essential to thriving in our careers. We are more trustworthy when people can rely on us to have measured responses. This is essential to building long-term, collaborative relationships.

FOUNDATIONS

01 **Know how to calm yourself.** We want reliable techniques to reduce anxiety and agitation. Deep breathing, walking, and music work. In a meeting, try contracting from your toes to your navel. Simple, biological hacks work fast.

02 **Assume good intent.** Most people have good intent at work. Assume that it is unintentional when they frustrate, disappoint, or annoy you. Focus on their behaviours that you want to be different, not their character.

03 **Have preferences over demands.** We rarely get everything that we want at work. Distinguish between your preferred outcomes and your non-negotiable demands. We have better relations when we do not elevate preferences to demands.

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04 **Be an excellent listener.** Listening can be difficult when the speaker has triggered uncomfortable emotions in us. Do not interrupt. Try to hear their message beyond their style. We may feel better with a deeper understanding of their position.

05 **Value long-term relationships.** Before we display negative emotions to colleagues, remember we may be working together for a long time. Always choose respect. Displaying warmth and humour will also reward us long-term.

Q25 My future career success will mostly depend on my effort

We can perform positive actions each day. These daily actions compound over years to create significant value for colleagues and customers. Creating this value rewards us. Our effort leads to future career success.

FOUNDATIONS

01 **Embrace optimism.** We can learn to be more optimistic. We can choose to believe a setback is not permanent and compartmentalise it to one area of our work. We can have setbacks and not attribute them to an enduring personal flaw.

Emotional Agility, continued

5 questions

Q25, continued

02 **Avoid the role of victim.** Job and career setbacks are inevitable. Sometimes these will be because we have been unfairly treated. To move forward and thrive, we need to avoid a victim mentality. We can focus on our next set of positive actions.

03 **Commit to lifelong learning.** Lifelong learning helps future proof our careers. We want to learn new techniques and tools in our field. Consistent, targeted learning helps us become experts.

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04 **Seize good luck.** All of us have good luck and bad luck. When we have good luck, we want to leverage it. We might be in the right place at the right time to receive an unexpected promotion.

05 **Lead yourself.** Self-leadership defines high performers. They welcome taking ultimate responsibility for their careers. We feel optimistic and empowered when we rely upon ourselves.

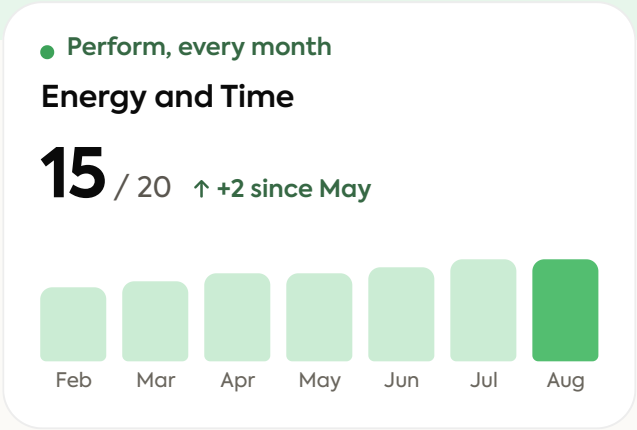
MONTHLY ASSESSMENT

Energy and Time

An honest read on where the month's energy and hours actually went.

A short monthly check-in on the habits that protect energy and focus. Each person gets a score out of 20, a trend across the months and the habits most worth changing.

Questions	20 statements, yes or no
Time	About 2 minutes, once a month
Answered by	The person, about their most recent month
Read by	Only the person, with their trend
Development	Five energy tips for every statement



Energy and Time month by month: this month's score beside the months before.

WHAT CHANGES

- **An early signal on overload, seen by the person first**
- **Habits that protect focused time, built month by month**
- **A personal trend that makes progress visible**

WHAT IT ASKS

Twenty habits across four kinds of energy.

Each statement is answered Yes or No for the last month. The score is the number of Yes answers out of 20, tracked month by month.

Physical

Sleep, food, exercise and when the hardest work gets done.

01 My diet was healthy

02 I had enough sleep

03 I did enough exercise

15 I performed my most demanding tasks when I was most alert

16 I worked hard then took short breaks to recharge in my workday

Emotional

Switching off, support from colleagues and pride in the work.

04 I easily switched off from work when I wanted to

05 Problems outside work did not impact my work performance

09 I had colleagues who cared about me

10 I was proud of the value I created in my job

Spiritual

Purpose: clear goals, strengths in use and autonomy.

06 I understood the work goals I was expected to achieve

07 I used my strengths in my job

08 I had autonomy in how I performed my work tasks

Mental

Focus and the systems that protect it, from task capture to meetings.

11 I embraced technology to advance my productivity

12 I used a reliable system to capture all my work tasks

13 I prioritised important tasks to achieve each workday

14 I said 'no' to additional tasks that were not a productive use of my time

17 I was focused and not distracted when I worked

18 I grouped similar tasks like email in dedicated blocks of time

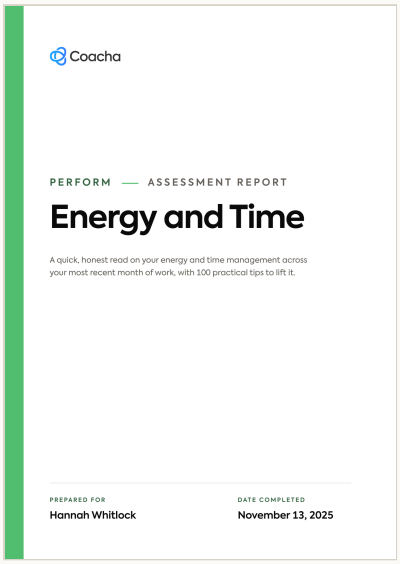
19 I did not procrastinate when I had important tasks to perform

20 The work meetings I attended were useful

THE REPORT

A monthly report, focus areas first.

Each sitting produces a short report. The statements answered No come first, each with its five tips.


Coacha

PERFORM — ASSESSMENT REPORT

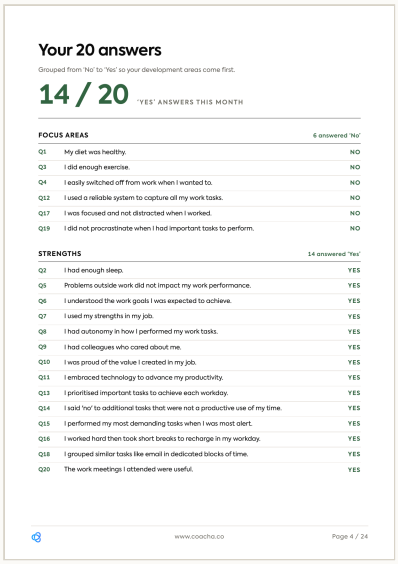
Energy and Time

A quick, honest read on your energy and time management across your most recent month of work, with 100 practical tips to lift it.

PREPARED FOR
Hannah Whitlock

DATE COMPLETED
November 13, 2025

Cover
Each month's report, kept as a PDF.


Your 20 answers

Grouped from 'No' to 'Yes' so your development areas come first.

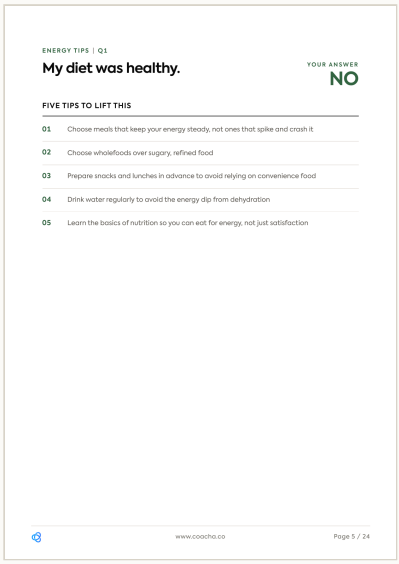
14 / 20 'YES' ANSWERS THIS MONTH

FOCUS AREAS		6 answered 'No'
Q1	My diet was healthy.	NO
Q3	I did enough exercise.	NO
Q4	I easily switched off from work when I wanted to.	NO
Q12	I used a reliable system to capture all my work tasks.	NO
Q17	I was focused and not distracted when I worked.	NO
Q19	I did not procrastinate when I had important tasks to perform.	NO

STRENGTHS		14 answered 'Yes'
Q2	I had enough sleep.	YES
Q5	Problems outside work did not impact my work performance.	YES
Q6	I understood the work goals I was expected to achieve.	YES
Q7	I used my strengths in my job.	YES
Q8	I had autonomy in how I performed my work tasks.	YES
Q9	I had colleagues who cared about me.	YES
Q10	I was proud of the value I created in my job.	YES
Q11	I embraced technology to advance my productivity.	YES
Q13	I prioritised important tasks to achieve each workday.	YES
Q14	I said 'no' to additional tasks that were not a productive use of my time.	YES
Q15	I performed my most demanding tasks when I was most alert.	YES
Q16	I worked hard then took short breaks to recharge in my workday.	YES
Q18	I grouped similar tasks like email in dedicated blocks of time.	YES
Q20	The work meetings I attended were useful.	YES

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The 20 answers
Focus areas first, then strengths.


ENERGY TIPS | Q1

My diet was healthy.

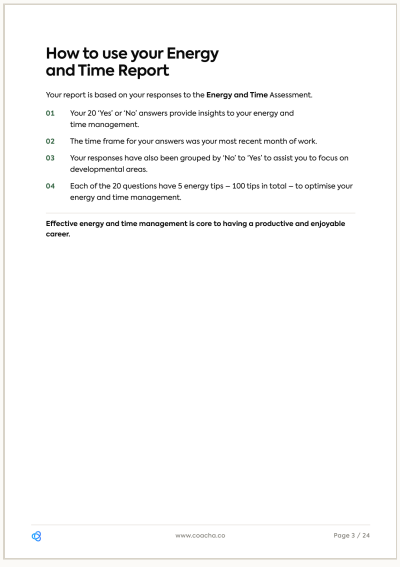
YOUR ANSWER
NO

FIVE TIPS TO LIFT THIS

01	Choose meals that keep your energy steady, not ones that spike and crash it
02	Choose wholefoods over sugary, refined food
03	Prepare snacks and lunches in advance to avoid relying on convenience food
04	Drink water regularly to avoid the energy dip from dehydration
05	Learn the basics of nutrition so you can eat for energy, not just satisfaction

www.coacha.co Page 5 / 24

Tips for a focus area
Five tips to lift a No answer.


How to use your Energy and Time Report

Your report is based on your responses to the **Energy and Time** Assessment.

01 Your 20 'Yes' or 'No' answers provide insights to your energy and time management.

02 The time frame for your answers was your most recent month of work.

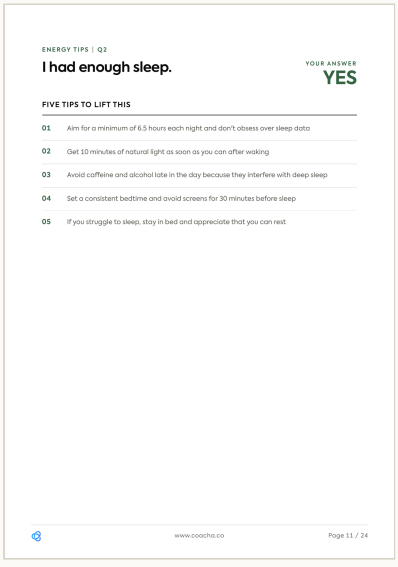
03 Your responses have also been grouped by 'No' to 'Yes' to assist you to focus on developmental areas.

04 Each of the 20 questions have 5 energy tips – 100 tips in total – to optimise your energy and time management.

Effective energy and time management is core to having a productive and enjoyable career.

www.coacha.co Page 3 / 24

How to use it
What the score means.


ENERGY TIPS | Q2

I had enough sleep.

YOUR ANSWER
YES

FIVE TIPS TO LIFT THIS

01	Aim for a minimum of 6.5 hours each night and don't obsess over sleep data
02	Get 10 minutes of natural light as soon as you can after waking
03	Avoid caffeine and alcohol late in the day because they interfere with deep sleep
04	Set a consistent bedtime and avoid screens for 30 minutes before sleep
05	If you struggle to sleep, stay in bed and appreciate that you can rest

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Tips for every answer
A page for each statement.

One hundred energy tips, in full.

Five tips for every statement. In the report, the statements answered No come first.

Physical

5 questions

Q1 My diet was healthy

ENERGY TIPS

01 Choose meals that keep your energy steady, not ones that spike and crash it
02 Choose wholefoods over sugary, refined food
03 Prepare snacks and lunches in advance to avoid relying on convenience food
04 Drink water regularly to avoid the energy dip from dehydration
05 Learn the basics of nutrition so you can eat for energy, not just satisfaction

Q2 I had enough sleep

ENERGY TIPS

01 Aim for a minimum of 6.5 hours each night and don't obsess over sleep data
02 Get 10 minutes of natural light as soon as you can after waking
03 Avoid caffeine and alcohol late in the day because they interfere with deep sleep
04 Set a consistent bedtime and avoid screens for 30 minutes before sleep
05 If you struggle to sleep, stay in bed and appreciate that you can rest

Q3 I did enough exercise

ENERGY TIPS

01 Have walking meetings and walk while you listen to podcasts or audiobooks
02 Schedule 3 harder exercise sessions per week and defend this time
03 Choose activities you enjoy so exercise becomes sustainable, not a chore
04 Emphasise activities that elevate your heart rate and build strength
05 Pack exercise clothes and equipment the night before

Physical, continued

5 questions

Q15 I performed my most demanding tasks when I was most alert

ENERGY TIPS

01 Notice which times of the day you have peak energy
02 Schedule your most difficult and complex tasks for these times
03 Guard these times from interruptions and shallow work
04 Use low-energy periods for administration or recovery tasks
05 Build your day around energy, not just the clock

Q16 I worked hard then took short breaks to recharge in my workday

ENERGY TIPS

01 Regard breaks as performance enhancers not an indulgence
02 Work in sprints then move away from your screens
03 Take a few deep breaths, stretch, walk, and look at far away objects
04 Go outside for a burst of natural light
05 Have lunch away from your desk with colleagues or friends

Emotional

4 questions

Q4 I easily switched off from work when I wanted to

ENERGY TIPS

01 Create a routine to transition between work and non-work
02 Note progress from the workday and prioritise tasks for tomorrow
03 Use final 5 minutes of transit to relax by music or breathing exercises
04 Switch alerts off and focus on other people or a leisure activity
05 If you work from home, take a walk as part of your transition process

Emotional, continued

4 questions

Q5 Problems outside work did not impact my work performance

ENERGY TIPS

01 Regard work as a sanctuary where you get to use your strengths and find flow

02 Spend time with friendly, positive colleagues

03 Deep breathing, meditation, and listening to music help lower stress

04 Ask for help early if personal stress is becoming overwhelming

05 Eat, sleep, and exercise well to help reduce stress

Q9 I had colleagues who cared about me

ENERGY TIPS

01 Be friendly and approachable as your default demeanour

02 Initiate caring and generosity which will likely be reciprocated

03 Ask for assistance and support when you need it

04 Thank people for their support and share how it helped

05 Invest in peer relationships even when busy

Q10 I was proud of the value I created in my job

ENERGY TIPS

01 Reflect on the value you delivered for your clients, team, and organisation

02 Reflect on the value you created for yourself and loved ones by your job

03 Share your achievements in weekly team catch-ups as part of visibility management

04 Consider how you could create exceptional value in the next month

05 Celebrate your achievements to make them memorable which fosters resilience

Spiritual

3 questions

Q6 I understood the work goals I was expected to achieve

ENERGY TIPS

01 Consider how you can deliver exceptional value this week, quarter, and year

02 Ask for clarity from your manager when goals feel vague or are changing

03 Break large goals into daily and weekly actions to stay focused

Spiritual, continued

3 questions

Q6, continued

04 Reflect on your progress each day and what you want to prioritise tomorrow

05 Stretch and re-stretch your goals to be a high performer

Q7 I used my strengths in my job

ENERGY TIPS

01 Identify 2 to 3 tasks that energise you and do more of them each week

02 Share your strengths with your manager during check-ins or reviews

03 Seek projects that align with your natural abilities

04 Ask respected colleagues what they believe your strengths to be

05 Lean into your strengths to increase your productivity and wellbeing

Q8 I had autonomy in how I performed my work tasks

ENERGY TIPS

01 Consider if you're fully exercising the autonomy you've been delegated

02 Set your own workflow or order of tasks where possible

03 Propose your preferred work methods if they achieve the same outcomes

04 Explain politely to your manager that you're more motivated by more autonomy

05 Advance your skills so you can ask for more responsibility

Mental

8 questions

Q11 I embraced technology to advance my productivity

ENERGY TIPS

01 Focus on technology that helps you automate or streamline your work

02 Ask peers what tools or systems are boosting their efficiency

03 Ask your IT team and vendors for their recommendations on emerging tools

04 Use online courses to learn more about AI

05 Stay curious to help future proof your career

Mental, continued

8 questions

Q12 I used a reliable system to capture all my work tasks

ENERGY TIPS

01 Test technology advances to help capture your tasks

02 Close mental loops by capturing all the tasks you need to do

03 Create voice memos translated to text when you're in transit

04 Update CRMs and other digital task management systems each day

05 Assign tasks and timelines to specific projects

Q13 I prioritised important tasks to achieve each workday

ENERGY TIPS

01 Consult a reliable task management system

02 Start each day by identifying important tasks as your top 2 to 3 priorities

03 Use morning energy for the work that matters most

04 Batch low-value tasks together and handle them efficiently

05 Review your progress at the end of each workday

Q14 I said 'no' to additional tasks that were not a productive use of my time

ENERGY TIPS

01 Use the goals you have agreed with your manager to filter every request

02 Check if your manager wants you to reprioritise tasks

03 Don't immediately say 'yes' to requests from people outside your team

04 Say 'no' politely, connect this to existing commitments, and suggest alternatives

05 Remember saying 'yes' is saying 'no' to something else

Q17 I was focused and not distracted when I worked

ENERGY TIPS

01 Clear your mind and know the value you want to create before you start

02 Don't distract self by multitasking or hearing alerts

03 Work in a space that colleagues or family members won't distract you

Mental, continued

8 questions

Q17, continued

04 Work in time blocks that enable you to maintain high energy

05 Know that concentration is a skill that improves with daily use

Q18 I grouped similar tasks like email in dedicated blocks of time

ENERGY TIPS

01 Process email at 1 to 3 daily times and don't be captured by your inbox

02 Batch shallow administration tasks to avoid task-switching fatigue

03 Avoid multitasking to reduce errors and create flow

04 Return phone calls in 1 block of time

05 Combine similar meetings to reduce disrupting other work

Q19 I did not procrastinate when I had important tasks to perform

ENERGY TIPS

01 Focus on the layers of value you will create by completing the task

02 Have standards of good enough or excellence, but not perfection

03 Start with a small, doable action to gain momentum

04 Keep going if you're motivated to continue

05 Savour the feeling of overcoming procrastination and completing the task

Q20 The work meetings I attended were useful

ENERGY TIPS

01 Only attend meetings where your input, alignment, or learning is useful

02 Clarify the meeting's purpose and desired outcomes in advance

03 Respect time as a shared outcome and speak-up when meetings go off-track

04 Confirm the specific actions you will take after the meeting

05 Perform these actions asap and report back to other meeting attendees

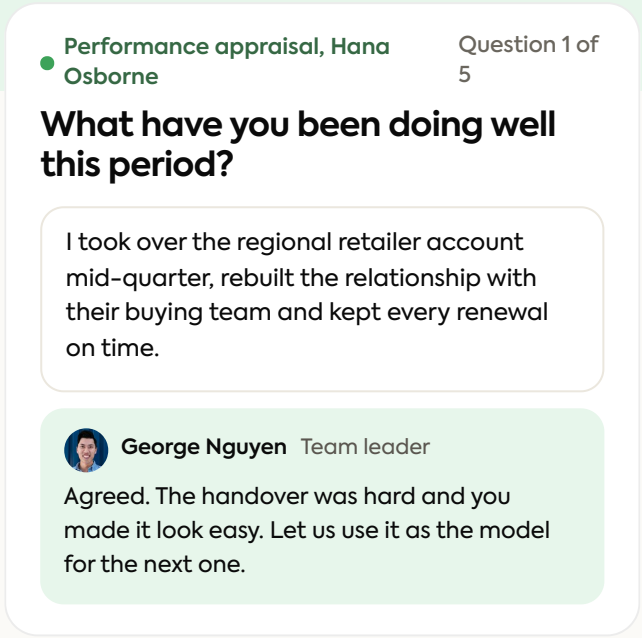
REVIEW CYCLE

Performance appraisals

The performance conversation, written down by both people in it.

The person writes first, their team leader responds, and together they agree the next step. Every appraisal becomes one clear record, ready for the conversation and kept for the year.

Who writes	The person first, in their own words, then their team leader adds a note to each answer
The questions	Five questions, the same for everyone, and a closing question for the team leader
Looking back	Goals set last time are read back, so progress is judged against what was agreed
Read by	The person, their team leader and HR
Rounds	HR sets the round, for everyone or for groups, and sees where every appraisal has got to



The person's answer, with their team leader's note beneath it.

WHAT CHANGES

- **Reviews that start from the person's own view**
- **Agreed next steps that flow straight into development**
- **One record HR can rely on, without chasing paperwork**

WHAT IT ASKS

Five questions, written by both people.

Each person writes at their own pace and saves as they go. Their team leader replies to each answer, then shares the notes back.

---

01 **What have you been doing well this period?**

The work you are proud of, and anything that went better than you expected. Specific beats comprehensive.

Team leader: What have you seen go well, and what would you add?

02 **What could you do better?**

The honest answer, not the safe one. This box exists to be useful to you, not to be marked.

Team leader: Where do you think the biggest gains are?

03 **How have you progressed against the main goals you set last time?**

Read back the goals from your previous appraisal and the note your team leader left on them. Say what moved, what did not, and why.

Team leader: How do you see the progress against those goals?

04 **What are your goals for the next period?**

What you want to have done by the time you write this again. These are what you will be asked about next time.

Team leader: What would you add or change about these goals?

05 **How can your team leader or the organisation help you reach these goals?**

Time, decisions, budget, introductions, cover, training, or anything else that is currently in your way.

Team leader: What will you and the organisation do about this?

+ **Do you have any other feedback for the person?**

A closing question for the team leader alone.

THE REPORT

A record for both people, and a summary for HR.

Every appraisal becomes a document both people keep. HR gets a summary of where the whole round stands.


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PERFORM — ASSESSMENT REPORT

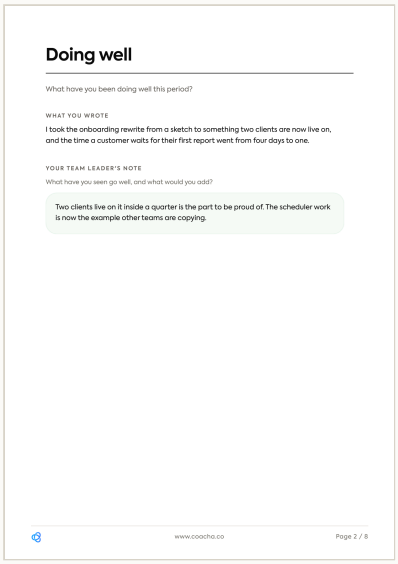
Your appraisal record

What you wrote, what your team leader replied, and when each step happened. A record for the two of you to keep.

PREPARED FOR
Amara Osei

PERIOD ENDING
30 June 2026

The appraisal record
One conversation, written by both.


Doing well

What have you been doing well this period?

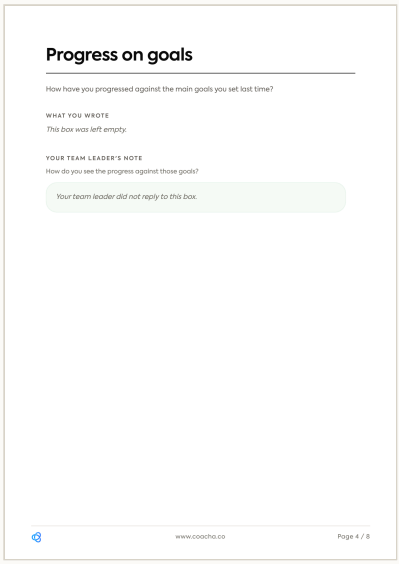
WHAT YOU WROTE
I took the onboarding rewrite from a sketch to something two clients are now live on, and the time a customer waits for their first report went from four days to one.

YOUR TEAM LEADER'S NOTE
What have you seen go well, and what would you add?

Two clients live on it inside a quarter is the part to be proud of. The scheduler work is now the example other teams are copying.

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Each question
The person's answer with the leader's note.


Progress on goals

How have you progressed against the main goals you set last time?

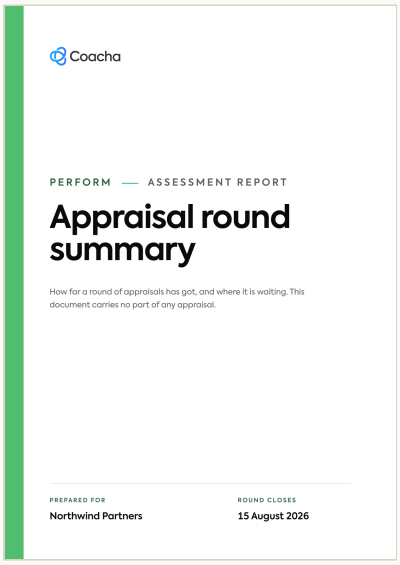
WHAT YOU WROTE
This box was left empty.

YOUR TEAM LEADER'S NOTE
How do you see the progress against those goals?

Your team leader did not reply to this box.

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Progress on goals
Last time's goals, read back.


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PERFORM — ASSESSMENT REPORT

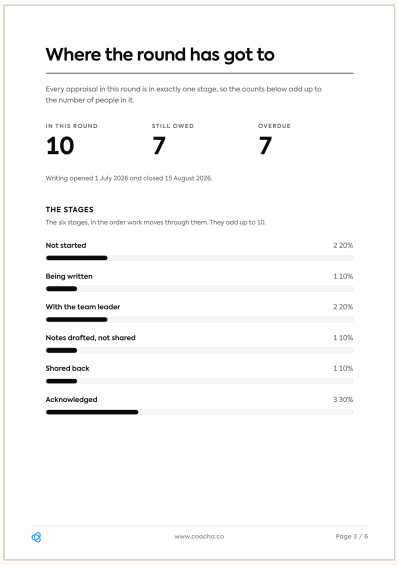
Appraisal round summary

How far a round of appraisals has got, and where it is waiting. This document carries no part of any appraisal.

PREPARED FOR
Northwind Partners

ROUND CLOSES
15 August 2026

The round summary
For HR.


Where the round has got to

Every appraisal in this round is in exactly one stage, so the counts below add up to the number of people in it.

IN THIS ROUND	STILL OWED	OVERDUE
10	7	7

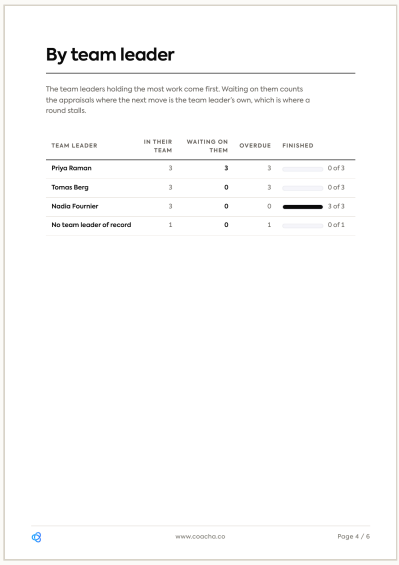
Writing opened 1 July 2026 and closed 15 August 2026.

THE STAGES
The six stages, in the order work moves through them. They add up to 10.

Not started	2	20%
Being written	1	10%
With the team leader	2	20%
Notes drafted, not shared	1	10%
Shared back	1	10%
Acknowledged	3	30%

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Where the round has got to
Every appraisal, by stage.


By team leader

The team leaders holding the most work come first. Waiting on them counts the appraisals where the next move is the team leader's own, which is where a round stalls.

TEAM LEADER	IN THEIR TEAM	WAITING ON THEM	OVERDUE	FINISHED
Priya Raman	3	3	3	0 of 3
Tomas Berg	3	0	3	0 of 3
Nadia Fournier	3	0	0	3 of 3
No team leader of record	1	0	1	0 of 1

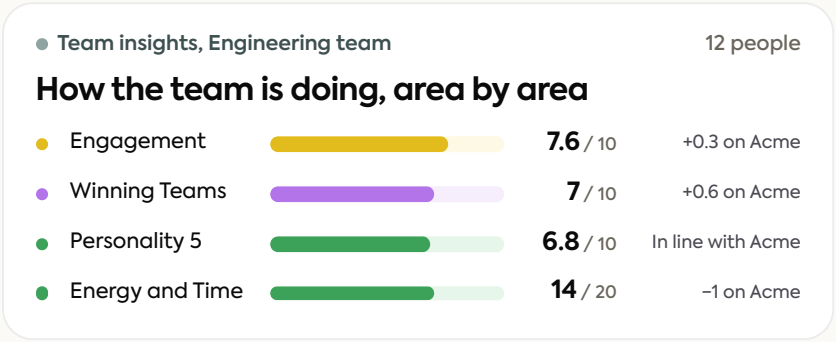
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By team leader
Who is holding the most work.

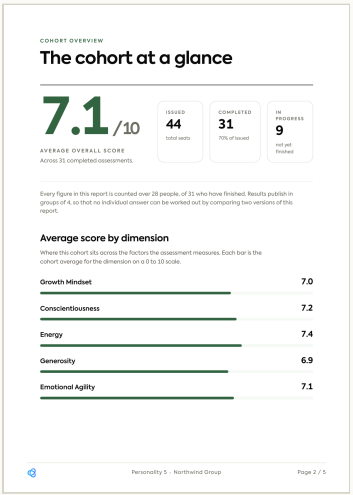
FOR TEAM LEADERS AND HR

Team and organisational insights.

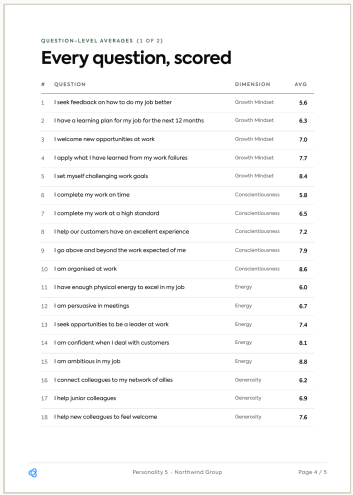
Team leaders see how their team is doing in every area, beside the organisation. HR sees every team side by side.



Team insights: how a team is doing in every area, beside the organisation.



Personality 5 cohort
Average and spread by trait.



Every question
Across everyone.



Energy and Time cohort
The habits most and least in place.

Perform works with every area

Each area is complete on its own. Together they share the same people, teams, reports and learning.

Lead Leadership and teams	Leaders take Triple Intelligence Leadership and Leader 360, and teams take Winning Teams.
Sell Selling that creates value	Salespeople and sales leaders take the Value-Centred assessments and plan their sales actions.
Engage How people experience work	The engagement survey shows how everyone experiences work, team by team.
Coach Coaching and learning	Every Perform result turns into a self-coaching goal, a buddy conversation or a module in the library.

See Coacha with your people in mind.

Tell us what you want to move forward, and we will walk you through the areas that fit.

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team@coacha.co

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