

Mr. Jim Kirk

InfoTech Research Group Inc.

Review Summary

ITRG FY24 Year-End PA

Jim Kirk, Executive Counselor Employee Notes

Effective Date 08/01/2024

Welcome to your year-end Performance Appraisal! Please provide ratings on goals and competencies, and note any corrections for your manager.

Contributors

Jim Kirk

Due Date 08/16/2024

Cole C

Due Date **09/27/2024**

Review sections

	Employee Rating	Manager Rating	
<u>Goals</u>	4.70 - Exceptional	4.70 - Exceptional	Vi ew
<u>Competencies</u>	4.00 - Exceeds Expectations	4.25 - Exceeds Expectations	Vi ew
<u>Overall Comments</u>	N/A	N/A	Vi ew
<u>Final Score</u>	4.63 - Exceptional	4.66 - Exceptional	

Sign & Complete

Send to the next contributor.

Sign & Complete

Acknowledgement

I have reviewed this document. My signature indicates that I have been advised of my performance status.

Jim Kirk 09/27/2024 5:57 PM

Final Comments

Mr. Jim Kirk - InfoTech Research Group Inc.

Jim Kirk - Goals

1. **Manage Service Delivery - Drive MCV Growth**

Goal Weight : 60%

0% complete

1. Support 120%+ MCV return within your territory – average per Counselor account

2. Ensure high service delivery value to drive Account Growth

Performance measured by:

- MCV growth of territory, based on personal OTE target

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Notes

Jim Kirk, Employee

5 - Exceptional

I couldn't be happier to have achieved my growth target for F24, including making P-Club. There was a lot of scratching and clawing involved as I lost 4 accounts throughout the year (1 due to Sales shenanigans, 1 due to a CIO termination, and 2 due to budget constraints). Result = 108% of target.

Despite these losses, the gains were even more noteworthy. Partnership with great sales reps like Sid G, Manoj A, Tiffany M, Dan D, and others yielded big wins in territory. Specific wins include the Ontario College of Teachers, the City of Markham, the Municipality of Niagara, BC College of Nurses and Midwives, Elections Ontario and the Municipality of Durham to name a few.

My part in these successes starts with planning and preparedness. I'm always the most prepared person on any call, and I work hard to deliver consistently great experiences for our members. This has increased the credibility that Info-Tech has with my DMs and this has played a key part in driving growth.

Cole C, Manager

5 - Exceptional

Jim is bang on point that planning and preparedness is the key - knowing your member is the key to making sure you deliver value every time. The growth within what we would traditionally consider small accounts shows that good service creates great opportunities. I know that this comes at a cost in effort especially given the number of accounts that supports, and my Far Exceeds rating is based on him doing this for a large number of Ontario accounts with a service entitlement far larger than their CV due to 2019 pricing. Nice work Jim!

2. **Manage Service Delivery – Drive Renewal**

Goal Weight : 30%

0% complete

1. Deliver Core KIP, Diagnostic Calls within your Territory Ensure Diagnostic calls deliver high measured value & result in next steps
2. Help ensure 100% of members consume 4+ high value experiences annually
3. Help improve our service Delivery experience & create maximum value
4. Manage Overall Service Delivery Design, Quality & Member Outcome
5. Deliver on the promise of helping members “systematically improve their department”
6. Build strong loyal relationships with Members
7. Book SME as required for deep roles like EA, PMO & Security
8. Visit clients on-site to deliver services

Performance measured by:

- All CKIPs delivered
- Service metric success = >= 70%

Show details...
Notes

Jim Kirk, Employee

I've worked really hard this year to ensure my members are getting the service they've paid for.

4 - Exceeds Expectations

From a CKIP perspective, I built and delivered ~70 CKIPs in Fiscal 2024. I've been a vocal supporter of the new CKIP Automation Tool and have optimized my use of it to the benefit of our members. My approach to CKIPs emphasizes "Custom" and quality. They are always well received by members. One member this year (GoA - TI), after a CKIP Delivery, said: "I feel heard" because of the time I took to articulate their context in their words.

To ensure I stay on top of a member's service and experiences, I track my monthly and/or quarterly engagements quite closely (Kanban) and work with reps to get meetings scheduled as necessary. For my counselor members, I manage the bookings on my own and have had success keeping the continuity and momentum going with a monthly cadence.

By the numbers, you can see that I have driven a lot of diagnostics this fiscal. I take pride in positioning the 4 core diagnostics on a regular basis and I prepare diligently to deliver the reports back to the DM (and other stakeholders if desired) such that recommended improvements opportunities are understood and acknowledged.

Concierge services has been a focus across my book of accounts... working diligently to position those offerings to members with the entitlement. I've also executed on IT Strategy Review now several times and feel comfortable delivering that where appropriate.

I take pride in the relationships that I have built with many of our members. Everyone finds me personable, prepared, helpful, and empathetic. This has been reflected in my Measured Value Survey results/comments.

Cole C, Manager

Jim has every right to be proud, especially as he is quick to share his expertise and support with his colleagues. Moving into 2025 the big thing I need Jim's support on is driving more efficient and effective ways to service the large accounts he is developing for us. Our scale and growth depend on us driving this every day.

4 - Exceeds Expectations

3. **Subject Matter Expertise & Member Support (EC)**

Goal Weight : 10%

0% complete

1. Deliver consistently high-quality experiences to our members

2. Manage member-facing utilization

3. Act as SME & help provide input into the Agenda & scoping blueprints and own the call Delivery process for Diagnostics

Performance measured by:

- Measured value ≥ 9.0
- Utilization ≥ 40 hours/month
- Subjective assessment

Show details...

Notes

Jim Kirk, Employee

5 - Exceptional

As I've said above, quality and consistency are core to who I am and how I work. This is reflected in all the work that I do with our members, whether that be a CKIP or diagnostic delivery, a counselor working session, or even an ad hoc advisory call. While I am a former CIO (who are inherently generalists), I still can act and deliver as an SME in a variety of area. I've directly supported members with IT Strategy, IT Governance, Project Portfolio Management, Service Management, Enterprise Architecture, and Infrastructure/Cloud related challenges this year.

I closely track my member-facing engagements throughout the year and actively work to ensure they receive the level of service from me they are entitled to. I have the spreadsheet to prove it. :)

Hitting the service metric of 40 hours/month has become easier with the transition to Executive Counselor and the additional of several large, busy accounts. While I know that this (and other) ES metrics will be reviewed in the months ahead, I feel confident in my ability to hit this target consistently with more counselor-level seats and increased consumption of concierge services that I directly deliver.

From a measured value survey perspective, I have vastly exceeded the quantity target for # of surveys received. If Gainsight is correct, I have 36 surveys for fiscal 2024 with an average score of 9.36.

Lastly, I have contributed to several pieces of research throughout the year. Whenever I'm asked to help my colleagues in research, I do. I directly supported the refresh of Standardize the Service Desk, and the introduction of Build a FinOps Strategy to Enable Dynamic Cloud Cost Management to name a couple.

Cole C, Manager

5 - Exceptional

Jim's quiet confidence and expertise make him my go to person to evaluate ideas and concepts. My biggest regret is that the challenges of this year have limited the time I should have been spending with him! Too many one on ones have been spent dealing with emergencies rather than big picture items that will move us forward as a team. In the year to come I'd like to see Jim taking on a greater role leveraging his expertise to define how we operate on Enterprise accounts. Participating on the EC council is a good start, but I'm looking for him to make a bigger impact than is possible through that forum!

	Employee Rating	Manager Rating
Average Goal Ratings	4.70 - Exceptional	4.70 - Exceptional

Mr. Jim Kirk - InfoTech Research Group Inc.

Jim Kirk - Competencies

1. Commitment to Exceptional Performance & Goals

Competency Weight : 25%

Setting stretch goals for results & process metrics & demonstrated commitment to reach those results.

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Notes

Jim Kirk, Employee

4 - Exceeds Expectations

From a leadership profile perspective, I have a high achievement orientation (with humanistic/encouraging as a close second). The goals that I set for myself always exceed those set by my supervisor or the organization where I work. This hasn't changed since coming to Info-Tech and will follow me when I depart for my next chapter/challenge.

I am very performance measurement-centric. I check my metrics every. single. day. and actively take steps to exceed targets (where possible/reasonable).

No comments are available.

Cole C, Manager

4 - Exceeds Expectations

2. Commitment to Learning & Development

Competency Weight : 25%

The effort spent on job-related learning and development as well as applying it to be more successful in your role.

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Jim Kirk, Employee

3 - Met Expectations

This was my busiest year yet at Info-Tech. As such, I don't feel like I had the bandwidth to pursue my ongoing job-related learning and development as I have in previous years. To compensate, I had to prioritize. As such, I spent what little time I had in this area focusing in on our emerging AI/Exponential IT research. In effect, I was learning alongside our members. Staying on top of our AI-related research aided me immensely in dozens of conversations with members trying to chart their path forward in this area and often this resulted in more

detailed experiences being booked with our SMEs.

My hope for fiscal 2025 is I have a bit more time to breathe and a bit more time to read.

No comments are available.

Cole C, Manager

4 - Exceeds Expectations

3. Commitment to Values

Competency Weight : 25%

Deliver Extraordinary Value, Expect Excellence, Act with Integrity, Get things done & Enjoy the Work we do.

Show details...

Notes

Jim Kirk, Employee

5 - Exceptional

One of the nicest things ever said to me (in my opinion... and context is key) was by a union-thumping, gossip hound in the Ontario Public Service. This person never had anything good to say about management. It was my going away party, after 11 years there, and this person came up to me and said: "Jim, I've never heard a single person say a bad thing about you. You'll be missed." I took this as clear evidence of how I managed and led there for so long. With honesty and integrity.

I actually like the 3x value mantra the firm has been saying for some time now... that's how I've always approached my work. I want to make sure that our members feel like they are getting way more value than what they pay for our services. I think this is reflected in the high quality relationships I've built both internally with my delivery partners here at Info-Tech and with our members themselves. This is enabled by the methodical and consistent way I approach my work obligations.

I've always had an action-oriented, "Get er done" attitude. Outcomes and results is what I've always chased and I've always managed to have fun while doing it.

No comments are available.

Cole C, Manager

5 - Exceptional

4. Drive & Engagement

Competency Weight : 25%

The amount of effort & drive to attain success. Possibly the most important competency.

Show details...

Notes

Jim Kirk, Employee

I've been highly engaged in Info-Tech improvement initiatives since I started at the company.

4 - Exceeds Expectations

In my first year, I took on a larger role in the management of the CKIP Support function, offering to bear the burden of coordination and assignment of new CKIP requests as they came in.

In my second year, I played a material role in the design and testing of the CKIP Automation tool.

In my third year, this has continued with my assignment to and support of the new EC Council. In this capacity, I'm giving of my time and expertise to try and move the needle on issues impacting Executive Services broadly and in so doing, driving better service, experience, and value to Info-Tech members.

All of this on top of having one of the largest books in Executive Services.

No comments are available.

Cole C, Manager

4 - Exceeds Expectations

Employee

Manager Rating

Average Competency Ratings

4.00 - Exceeds Expectations

4.25 - Exceeds Expectations

Mr. Jim Kirk - InfoTech Research Group Inc.

Jim Kirk - Overall Comments

Jim Kirk , Employee

I'm pleased to complete my third year at Info-Tech with my second time achieving P-Club.

This job fulfills much of what I was hoping for when I left the public sector in 2021. I really wanted to get back to the basics of helping people, not unlike when I started in the industry all those years ago. While my book has changed pretty remarkably since I started with the firm, I have had the pleasure of building some long-term relationships with members that extend 2 years plus. This is great for the firm and good for me on a personal level - it's great expanding your network of peers/colleagues.

Going forward, I'm curious what my first full year at the EC level will look like and how my book will continue to shape as the year progresses. I'm also closely monitoring the firm's growth and continued evolution. My hope is that the pursuit of 1B doesn't begin to eat away at what makes the company special to begin with. We don't want to become what we're hoping to defeat.

Cole C. , Manager

Jim shows up. This might seem like a moment of faint praise, but I can't think of a higher compliment to pay to him. He showed up when Halifax was burning and he had to evacuate his family. He showed up when the going got tough on key accounts and we needed to figure out how to move ahead. He showed up and helped his colleagues succeed even while carrying an over the line book. I appreciate everything Jim does for the team in global services and in the broader organization. Moving into the new year I would like to see Jim stop waiting to say his piece, start taking on a more active leadership role in driving better practices in the organization, and continue driving exceptional value for our members.
