



DIRECT REPORT PROFILE INFORMATION

Name: _____

Company start date: _____

Current Position: _____

Primary Role Responsibilities

Role's Key Performance Indicators

QUESTIONS:

▶ What is their anticipated next position/role?

▶ What is their Personality Profile (e.g., DISC, Predictive Index, MBTI)?



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▶ What makes them tick?

Professionally: _____

Personally: _____

▶ What are their unique talents and abilities?

▶ In what type of situations do they thrive?

▶ What is the best way to motivate them?

▶ What is the best way to give them constructive feedback?



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▶ In what areas do they need to grow/improve?

▶ In what types of situations do they struggle?

▶ Any significant personal events/issues that may affect them at work (short term/long term)?

▶ Are they married or do they have a significant other? If yes, what that person's name



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▶ Do they have kids? If yes: how many? What are their names and ages?

▶ What do they like to do with their free time?

▶▶ **Other pertinent information** ◀◀

