

1 **Undertaking Request (U-36)**

2 **Thursday, April 26, 2018**

3 **Transcript Reference: Pg. 83, lines 12-23**

4 Undertake to provide a copy of what the measures and objectives for Mr. Coish's
5 performance reviews.

6

7

8 **Undertaking Response**

9 Please refer to U-DD-036 Attachment 1 which contains the 2017 Key Responsibility Areas
10 (KRAs) and performance objectives for the Manager, Key Accounts position.

ANNUAL PERFORMANCE REVIEW

Status:

Performance Review Year: 2017

Created By:

Created On:

Type of Feedback:

BASIC INFORMATION	
Employee Name: Robert Coish	Division:
Employee's Number:	Department:
Employee's Position Title: Key Accounts Manager	Supervisor's Name:

3. KEY RESPONSIBILITY AREAS (KRA)

1. Planning and Administering Account Management Program
 - Business Process Improvement of Account Management Program
 - Develop Relationship with Hydro's Key Commercial and Industrial Customers
 - Develop Strategic Account Management Program
 - Liaise Between Hydro's Key Commercial and Industrial Customers and Executive and Senior Leaders
 - Formal Reporting of Account Management Program

Results and Performance Highlights:

Opportunities for Improvement:

Unacceptable
 Improvement Required
 Meets Expectations
 Exceeds Expectations
 Exceptional

2. Key Account Billing (Invoicing) & Power Purchase Accounts Management
 1. Oversee the Industrial Billing /Process Invoicing;
 2. Ensure customers are billed accurately and within required timelines;
 3. Provide direction and guidance to staff in:
 - a. Preparing power invoices for sale of power and energy to all industrial customers and to Newfoundland Power;
 - b. Ensures statistical, productions and bulk sales reports are prepared accurately and issued within set timelines; and
 - c. Acquires and retains full knowledge of all contracts, agreements, rates, data collection and invoices associated with all industrial and retail billing.
 - d. Monitors the operation of primary and back-up revenue metering used for Hydro's industrial and utility customers and reviews monthly power billings and statistical reports.
 4. Manage Power Purchase Accounts:
 - a. Manage Power Purchase Budgets
 - b. Review and Approve Power Purchase Invoices
 - c. Manage Power Purchase data collecting and reporting
 - d. Sit on due-diligence / negotiations team for Power Purchase contracts

Results and Performance Highlights:

a.

Opportunities for Improvement:

a. .

Unacceptable
 Improvement Required
 Meets Expectations
 Exceeds Expectations
 Exceptional

3. Formal Reporting of Account Management Program
 1. Set Key Performance Indicators (KPI), initiatives and targets that promote compliance to operational processes and support continual improvement over time;
 2. Prepare analysis, reports and recommendations to assist in making tactical and strategic business decisions related to the account management program;
 3. Review measures and standards on a regular basis to ensure that the work plan is being achieved; and
 4. Produce annual reports for key commercial and industrial customers

<i>Results and Performance Highlights:</i>	<i>Opportunities for Improvement:</i>
<input type="checkbox"/> Unacceptable <input type="checkbox"/> Improvement Required <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Exceptional	

4. Energy Efficiency - Lead and manage Hydro's Industrial Energy Efficiency Program

- Reach out to all Industrial Customers on the Energy Efficiency Program.
- Assist with any requests in this area.

<i>Results and Performance Highlights:</i>	<i>Opportunities for Improvement:</i>
<input type="checkbox"/> Unacceptable <input type="checkbox"/> Improvement Required <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Exceptional	

5. Business Development:

- Facilitate/Chair the "Labrador Commercial Load Growth" committee.
- Respond to new business development opportunities and external requests as required

<i>Results and Performance Highlights:</i>	<i>Opportunities for Improvement:</i>
<input type="checkbox"/> Unacceptable <input type="checkbox"/> Improvement Required <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Exceptional	

4. OBJECTIVES

This section is to be used to document and rate the employee's performance in relation to the following:

- a) Priority objectives identified for the employee in the relevant **DIVISIONAL/DEPARTMENTAL** workplan.
- b) **PERSONAL** objectives/targets identified in consultation with the immediate supervisor.

Divisional/Departmental Priorities

1. Develop Key Account Plans and establish KPI's

Results:

a.

2. Develop plan to implement IB recommendations

Results:

3. Implement Industrial Billing Software MV-PBS / SQL Database
Participate in the ERP project to implement new billing system (Utiligy 360)

Results:

4. - Ensure all scheduled one-on-one key customer meetings include a discussion/presentation on Industrial Energy Efficiency.
- Research and share customer/industry specific best practises/case studies with key customer contacts throughout the year.
- Update program marketing information demonstrating clear cost savings opportunities and ease of administration for customers, and share materials with industrial customers annually or as programs are changed/updated)

Results:

a.

Personal Objectives/Targets

1.

Results:

a.

2.

Results:

a.

3.

Results:

a.

4.	.
Results: a.	

RATING OF PERFORMANCE ON OBJECTIVES

- | | |
|--|--|
| <input type="checkbox"/> Planned Results Not Achieved | <input type="checkbox"/> All Planned Results Achieved |
| <input type="checkbox"/> Some Planned Results Achieved | <input type="checkbox"/> Results Exceeded Plan in Some Areas |
| <input type="checkbox"/> Many Planned Results Achieved | <input type="checkbox"/> Results Exceeded Plan in Many Areas |

5. OVERALL RATING OF PERFORMANCE

- | | | |
|---|---|--------------------------------------|
| <input type="checkbox"/> Unacceptable | <input type="checkbox"/> Meets Expectations | <input type="checkbox"/> Exceptional |
| <input type="checkbox"/> Improvement Required | <input type="checkbox"/> Exceeds Expectations | <input type="checkbox"/> N/A |

6. DEVELOPMENT PLAN

Proposed development plan for 2017

Development Plan Results:

7. COMMENTS

Supervisor's Comments:

Supervisor's Signature:

Date:

7. COMMENTS (Continued)

Employee's Comments:

I acknowledge having read and discussed this evaluation with my supervisor

Employee's Signature:

Date:

DEFINITIONS

Unacceptable

The employee's performance has consistently fallen short of the behaviors and outcomes expected of someone who is performing at a fully functioning level in this position.

Improvement Required

The employee's has demonstrated some of the characteristics or outcomes expected of a fully functioning person in this position, but some key expectations have not been met.

Meets Expectations

The employee has consistently demonstrated all characteristics and achieved all outcomes that would be expected of a fully functioning person in this position, and may have exceeded expectations in some areas.

Exceeded Expectations

The employee has consistently demonstrated characteristics and achieved outcomes which have exceeded what would be expected of a fully functioning person in this position.

Exceptional

The employee's performance is consistently characterized by excellence, innovation and continuous improvement, and has exceeded what would be expected of a fully functioning person in this position in most or all important areas.