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| **Manager:** | **[Insert]** |
| **Contributor:** | **[Insert]** |
| **Field Ride Date:** | **[Insert]** |

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| **Preparation** | **Yes/No** | **Notes** |
| Did they prepare a daily task list? |  |  |
| Do they follow a method or process for managing projects? |  |  |
| Do the primary tasks align with marketing department objectives? |  |  |
| Are meeting participants informed of meeting in a timely basis? |  |  |

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| **Execution of Tasks** | **Yes/No** | **Notes** |
| Did they follow the daily task list? |  |  |
| Do they follow a method or process for executing tasks? Do they avoid letting the next email that pops into their inbox demand their attention? |  |  |
| Is their task list for the field ride similar to past task lists (is today’s task list similar to how they work day to day)?  |  |  |
| Do they have good time management skills? |  |  |
| Do they take direction and incorporate it into their work? |  |  |
| Are best practices incorporated into their execution? Do they seek best practices? |  |  |
| Does their working environment reflect a self-management proficiency? Can they find things they need? |  |  |
| Are the tasks being completed in the expected amount of time? |  |  |
| Do they engage in unexpected non-marketing administrative tasks? |  |  |
| Are they performing tasks that should be performed elsewhere? |  |  |
| Is proactive work being performed to lay the ground for success in future deliverables? Or is everything a fire drill? |  |  |
| Do they respond in a timely manner to others who are relying on their input? |  |  |
| Do they provide good direction to those who report to them? |  |  |

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| **Facilitation of Meetings** | **Yes/No** | **Notes** |
| Did they effectively facilitate the meeting? |  |  |
| Did the attendees engage in the discussion?  |  |  |
| Did they tie back the meeting purpose to marketing team objectives? |  |  |
| Was the full agenda completed?  |  |  |
| Did the next steps get captured along with completion dates and owners? |  |  |

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| **Collaboration with Team and Partners** | **Yes/No** | **Notes** |
| Is the collaboration open and candid? |  |  |
| Do they respond well to pushback? |  |  |
| Do they have a collaborative nature and work well with others?  |  |  |
| Are they responsive to requests? |  |  |

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| **Marketing Field Ride Notes** |
| [Insert] |
|   |
| **Training or Process Notes**   |
| [Insert] |

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| **Areas of Improvement (2-3 Max)** |
| [Insert] |

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| **Next Steps and Due Date**:   |
| Improvement Area 1* [Insert]

Improvement Area 2* [Insert]
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