



Performance achievement review

NAME:

ROLE:

DEPARTMENT:

DATE:

GUIDELINES FOR COMPLETION

At the beginning of the review period:

- Agree with your assessor on objectives for your position that are aligned with departmental strategic objectives.
- Try to have at least one objective in each of the four quadrants (Financial, Customer, Operational, People). It is not necessary to have an equal number of objectives in each quadrant.
- In a particular objective influences results under more than one quadrant, align the objectives under the quadrant in which it is expected to have the largest impact.
- After the objectives have been identified and jointly agreed upon, they will be used to assess your achievement and contribution for the review period.

At the end of the review period:

- Determine a self-assessment rating and provide comments for each quadrant. (Supporting commentary is optional for each quadrant in which you rate “meets expectations.”)
- Your assessor will provide a rating and comments for each quadrant, as well as an overall rating and comments on the final page of the form.

Complete at the start of review period

I have read and understand my performance objectives as outline on the following pages.

DATE:

EMPLOYEE SIGNATURE:

ASSESSOR'S SIGNATURE:

STRATEGIC OBJECTIVES

FINANCIAL

- Support achievement of each program by reaching monthly and annual sales targets.
 - Oversee and manage monthly financial results to ensure financial operations do not exceed total budget allocation while meeting all regulatory and KSG compliance protocols.
 - Customize marketing and management strategies for optimized and balanced product mix in order to drive new account growth that is table and predictable.
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CUSTOMER

- Cultivate an extensive and collaborative internal and external networks of stakeholder relationships to deliver acquisition strategies (LTOs) and increase sales volumes.
 - Execute timely communication with all parties in order to educate and monitor adherence to client's and KSG code of conduct while promoting a positive customer experience.
 - Develop innovative solutions that create a unique customer experience and result in improved productivity, customer satisfaction and increased new accounts.
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OPERATIONAL

- Strengthen program reporting through timely measurement and segmentation of all KPIs.
 - Improve customer engagement by implementing sales tools (ex: digital ear, sales sheets).
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PEOPLE

- Effectively support internal and external partners.
 - Provide timely training and coaching to in-field sales force.
 - Guide, coach and support direct reports by nourishing open communication and positive team morale.
 - Clearly define roles and responsibilities of
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FINANCIAL – consider how you contribute to the financial success of your area.

Objectives

1. Support achievement of each program by reaching monthly and annual sales targets.
 - Delta/Amex: 9,342 new accounts
 - Direct Energy: 2,400 on-flow accounts
 - RBC: 900 new accounts
2. Oversee and manage monthly financial results to ensure financial operations do not exceed total budget allocation while meeting all regulatory and KSG compliance protocols.
 - Vigorous expense management
 - Identify changing trends or variances to fiscal plan
 - Create appropriate performance measures to ensure projects do not exceed set budgets/timelines.

Employee's comments

Assessor's comments

RATING – choose one:

Employee:

- ☐ Exceeds expectations
- ☐ Meets expectations
- ☐ Needs improvement

Assessor:

- ☐ Exceeds expectations
- ☐ Meets expectations
- ☐ Needs improvement

CUTOMER – consider how you contribute to improving the experience of the customer, whether internal or external.

Objectives

Employee's comments

Assessor's comments

RATING – choose one:

Employee:

- ☐ Exceeds expectations
- ☐ Meets expectations
- ☐ Needs improvement

Assessor:

- ☐ Exceeds expectations
- ☐ Meets expectations
- ☐ Needs improvement

OPERATIONAL – consider how you contribute to improving operations, productivity, and effectiveness in your area.

Objectives

Employee's comments

Assessor's comments

RATING – choose one:

Employee:

- ☐ Exceeds expectations
- ☐ Meets expectations
- ☐ Needs improvement

Assessor:

- ☐ Exceeds expectations
- ☐ Meets expectations
- ☐ Needs improvement

PEOPLE - consider how you contribute to your own development, your team's development (if you manage people), and your immediate work environment.

Objectives

Employee's comments

Assessor's comments

RATING - choose one:

Employee:

- ☐ Exceeds expectations
- ☐ Meets expectations
- ☐ Needs improvement

Assessor:

- ☐ Exceeds expectations
- ☐ Meets expectations
- ☐ Needs improvement

OVERAL COMMENTS

Summarize overall achievements and add relevant information not already included.

Employee's comments

Assessor's comments

EMPLOYEE'S OVERALL RATING BY ASSESSOR

☐ Superior

☐ Distinguished

☐ Quality

☐ Improvement
needed

☐ Unacceptable

I have read and reviewed the Performance achievement review and:

☐ Agree

☐ Disagree

EMPLOYEE SIGNATURE:

ASSESSOR SIGNATURE:

ASSESSOR'S SUPERVISOR SIGNATURE:

DATE: