

ENGAGEMENT SCORECARD



Total Score 3.200

YEAR: 2024

MONTH: March

LOAN OFFICER NAME: Jesse Markman

SCORED BY: Mitchell Rowan

KPI	Target	Actual	Score	Weight	Weighted Score
Service Requests Logged	10	5	2	0.1	0.2
Client Outreach Attempts	100	50	1	0.1	0.1
Files Finalized	10	9	2	0.2	0.4
First-Time Clients Called	3	4	4	0.1	0.4
Engaged Client Interactions	60	34	2	0.1	0.2
Client Relationships Completed	7	8	4	0.1	0.4
Contract Value Closed	100,000	200,000	4	0.3	1.2
Total Score				2.900	

	Actual	Actual Origination	Target
Pending	250,000	264.45%	150

Company Values

Question	Response Form	Subjective Score
How effective is the team's communication?	Team members communicate clearly and share information regularly, though there are occasional gaps when updates aren't promptly relayed. Overall, communication supports collaboration but could be improved with more structured check-ins.	4
How well are goals being met?	Most goals are being met on time, and the team shows strong progress on key priorities. However, some objectives lag slightly due to competing demands, highlighting opportunities for better planning and resource allocation.	4
How proactive is the team in addressing challenges?	Demonstrates initiative and often anticipates potential issues before they escalate. That said, there are moments when problems are addressed only after they arise, suggesting room for more consistent proactive planning.	3
How satisfied are clients with support?	Clients generally report satisfaction with the level of support provided. Positive feedback often highlights responsiveness and helpfulness, though a few clients have indicated minor delays or gaps in follow-up that should be addressed.	3
Additional Comments	Has shown consistent effort and dedication across all key areas. Strengths include clear communication, client engagement, and proactive problem-solving. Opportunities for improvement include maintaining consistent follow-up, balancing priorities, and ensuring all objectives are tracked and updated regularly. Overall performance reflects a positive trajectory, with solid potential for continued growth and	
Subjective Score		3.500

ADDITIONAL COMMENTS: