



Ongoing Feedback and Performance Review Overview

Feedback is essential for continuous improvement and career development.

- **Enhances Growth:** Discover your strengths and areas for development to help you reach your ultimate career goals.
- **Recognition:** We will celebrate your successes and acknowledge your hard work, ensuring that your contributions are valued and recognized.
- **Boosts Engagement:** This is an opportunity for you to share your perspectives and discuss your career aspirations and any challenges you might be facing.
- **Develops Skills:** Identify and refine key skills that contribute to your professional advancement.
- **Aligns Goals:** Ensure your personal objectives align with company goals for a unified path to success.

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What To Expect

As you complete your review forms, keep in mind that this process is designed to be constructive and supportive. Your feedback and reflections are crucial in shaping a tailored development plan that supports your success and aspirations.

When Will Performance Reviews Happen

As a new Sales Professional, you will have a Performance Review at your 30, 60, and 90 day mark of employment. After your first 90 days on the team, you will receive regular monthly performance feedback from your manager during the Monthly Touch Base, Monthly Touch Bases happen withing 15 days of the close of the previous month.

Thank you for your ongoing commitment and contributions. We look forward to discussing your performance and future growth.



Review Form



LEADERS HOLDING CO.
Est. 1971

PERFORMANCE REVIEW: INTRODUCTORY PERIOD

Team Member Name	Location/Position
Review Date	Last Review Date
Reviewers Name	Type of review
	30-Day 60-Day 90-Day

5. Exceptional: Consistently achieves results above and beyond what is expected for the time in the position.
 4. Exceeds Expectations: Occasionally goes above and beyond; consistently meets what is expected for the time in the position.
 3. Meets Expectations: Consistently making the necessary progress in learning and performing the duties of the position.
 2. Needs Improvement: Is inconsistent in meeting requirements and is not making the expected improvement necessary to learn and perform the duties of the position.
 1. Unsatisfactory: Does not exhibit the behaviors or aptitude necessary to learn and perform the duties of the position. Employee is at risk for termination.

PERFORMANCE CATEGORIES		RATING				
JOB KNOWLEDGE: Making steady progress to acquire the knowledge and skills necessary to perform the duties of the position. Exhibits a proactive approach to learning.		5	4	3	2	1
Team Member						
Supervisor						
Explanation for Rating:						
COMMUNICATION: Possesses the ability to communicate in a professional and effective way verbally and in writing. Has the appropriate listening skills required to excel in the position.		5	4	3	2	1
Team Member						
Supervisor						
Explanation for Rating:						

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INITIATIVE: Takes initiative within the scope of responsibility. Demonstrates the ability to be a creative problem solver.		5	4	3	2	1
Team Member						
Supervisor						
Explanation for Rating:						
INTERPERSONAL SKILLS: Demonstrates the ability to work collaboratively with others to achieve goals; is a "Team Player". Uses appropriate tone and level of respect when communicating.		5	4	3	2	1
Team Member						
Supervisor						
Explanation for Rating:						
ADAPTABILITY: Is comfortable with change and consistently seeks a better way to do things. Is flexible and accommodating when necessary.		5	4	3	2	1
Team Member						
Supervisor						
Explanation for Rating:						
DECISION MAKING: Consistently uses logic and demonstrates sound judgment. Knows when to ask for assistance or direction.		5	4	3	2	1
Team Member						
Supervisor						

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Explanation for Rating:						
ADHERENCE TO COMPANY POLICIES AND PROCEDURES: Strives to learn company policies and procedures and demonstrates a willingness to adhere to policies, procedures and management instructions.		5	4	3	2	1
Team Member						
Supervisor						
Explanation for Rating:						

INDIVIDUAL GOALS AND ACCOUNTABILITIES:	DUE DATE

What could we do as a company to help you be successful?

COMMENTS:

Employee Signature: _____ Date: _____
 Reviewer Signature: _____ Date: _____

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Showroom Summary

Only type in Blue Highlighted Fields.

Your Showroom

Sales | Sales by Sales Person (Written)

8/12/2024 <-- Last Updated Date

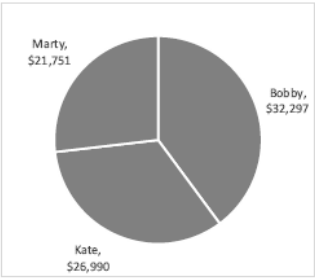
SHOWROOM PERFORMANCE

KPI	AMOUNT or %	GOAL	\$/% TO GOAL
Sales Orders	\$81,038	\$123,000	\$41,962
Delivery	2.75%	3.50%	0.75%
Protection	1.65%	1.25%	0.00%
Accessory	4.90%	3.60%	0.00%



INDIVIDUAL PERFORMANCE

Team Member	SALES	% OF TOTAL	Avg Sale	DELIVERY	PROTECTION	ACCESSORIES
				GOAL 3.5%	GOAL 1.25%	GOAL 3.6%
Bobby	\$32,297	39.9%	\$2,008	2.90%	1.50%	4.60%
Kate	\$26,990	33.3%	\$1,516	2.50%	1.30%	7.10%
Marty	\$21,751	26.8%	\$1,434	2.90%	2.50%	3.40%
		0.0%				
		0.0%				
		0.0%				
		0.0%				



Individual Team Member Summary

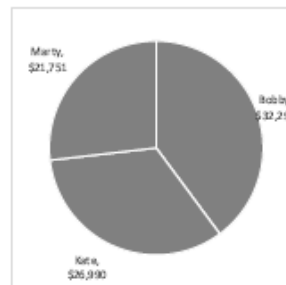
Kate

Each week - Fill in the areas below from the data on the top of the page.

This will autopopulate whenever you update the individual performance grid at the top of the page.

INDIVIDUAL PERFORMANCE

KPI	Week 1	Week 2	Week 3	Week 4	MONTH EOM
Sales	\$12,500	\$26,990			
% to Showroom	28.90%	33.30%			
Average Sale	\$1,275	\$1,516			
Delivery (3.5%)	2.75%	2.50%			
Protection(1.25%)	1.50%	1.30%			
Accessories(3.6%)	3.30%	3.40%			



	SELLING SKILLS	ADMINISTRATIVE	TEAM WORK
Wins	This is a spot to celebrate a team members wins for the month in each of the titled areas.		
Opportunities	This section is dedicated to a team member's opportunities for the month.		

Open Quotes #	Quotes that need Support & How	Quotes Anticipated to Close
Enter the number of quotes	Discuss any quotes that present challenges in closing and possible solutions to those challenges.	Discuss which quotes they feel they can close and when.

	SALES ORDER REVIEW
SO #	Sales Order# (list SO here)
Wins	These sections allow you to provide a team member with specific feedback on three sales per month.
Opportunities	

Recent Success Stories	(use ALT-ENTER to create new paragraph)
Ask the team member to share with you a recent success story.	
Which Open ended question is working best for you?	
Aske the team member to share what works best for them in open ended questions and notate their answers. Share with other team mebers that may be struggling in the same area.	
What skill do you want to focus on improving?	
Team members can choose what area they would like to focus on and why.	
Monthly Focus Follow Up	
This area is for defined focus areas (from Sales Leadership or the Showroom Manager).	
This can be CRM driven, product or service driven.	

