

## Performance Review Guidelines

### Performance Review Guidelines 2025

#### Overview

Annual performance reviews are conducted to evaluate employee performance, set goals, and identify development opportunities.

#### Review Process Timeline

- **January**: Performance review cycle begins
- **February**: Manager-employee review meetings
- **March**: Calibration sessions and final ratings
- **April**: Merit increase implementation

#### Performance Rating Scale

- **Exceeds Expectations (5)**: Consistently surpasses goals and expectations
- **Meets Expectations (4)**: Consistently achieves goals and requirements
- **Partially Meets Expectations (3)**: Generally achieves most goals
- **Below Expectations (2)**: Struggles to meet basic requirements
- **Unsatisfactory (1)**: Fails to meet minimum job requirements

#### Key Performance Areas

##### Sales Representatives

- Revenue achievement vs. quota
- New customer acquisition
- Customer satisfaction scores
- Pipeline development and management
- Product knowledge and skills demonstration

##### Marketing Team

- Lead generation and quality metrics
- Campaign performance and ROI
- Brand awareness and engagement
- Content creation and thought leadership
- Cross-functional collaboration

##### Finance Team

- Accuracy of financial reporting
- Process improvement initiatives

- Compliance and audit results
- Budget management and forecasting
- Vendor relationship management

### Development Planning

- Individual development plan creation
- Training and certification requirements
- Mentorship program participation
- Career advancement discussions
- Skill gap analysis and improvement plans