

30/60/90 Day Review

Review Period From:

To:

Employee:

Job Title:

Supervisor:

As an employee of Arca Lending (the "Company"), you are an important member of a team effort. We hope that you will find your position with the Company rewarding, challenging, and productive.

The purpose of the 30/60/90-day review is to ensure that all available training, coaching and employee engagement tools are made available for every new hire. Our goal is to have the best informed, best trained and the most engaged employees possible.

60 Days

Manager:

It is important that you take this next step and provide honest, thoughtful and accurate feedback for your employee. Your feedback will help us and you to determine if the employee is successful in their job and is on the right path. However, if that is not the case and the employee's progress at mastering the job responsibilities and core competencies is slower than anticipated to date, it is important to identify and document action steps and goals for the next 30 days. The goals and action items must be detailed enough to provide a basis for determining whether the employee will continue employment after 90 days.

NOTE: Do not sign yet. Send completed form to HR for review.

HR will request signatures via Adobe Sign.

Supervisor Signature

Date of Meeting

Employee Signature

HR Signature

Rating Name:	Description:
Needs Improvement	On the road to meet expectations with more training
Unsatisfactory	Not meeting expectations
Satisfactory	Meeting Expectations

Skills Assessment	Skill Rating: Unsatisfactory(U), Satisfactory(S), Needs Improvement(NI)		
People Service: Team member can Actively Listen and understand the needs of the person. As well as ability to provide a solution or expertise needed to satisfy the internal or external client's needs.	Rating30:	Rating60:	Rating90:
	Comments: Has the team member improved since the last review or there still concerns?		
Organizational Skills: Team member can prioritize duties/tasks on the daily/weekly basis to get projects/work done in a timely manner.	Rating30:	Rating60:	Rating90:
	Comments: Is there improvement? Does team member still need support with this skill?		
Time Management: Complete work in a timely manner. Ability to organize/prioritize and tasks/projects to deliver results on time.	Rating30:	Rating60:	Rating90:
	Comments: Has team member been able to keep up and improve?		
Team Work: One of the most important components is the team members ability to work as part of the team and have productive interactions.	Rating30:	Rating60:	Rating90:
	Comments: How is the team working together, are there any concerns to address?		
what the Culture is: Does the team member understand what our culture is and demonstrate it.	Rating30:	Rating60:	Rating90:
	Comments:		

Programs used by the Team

Member: Only rate those that are Applicable to the position and the employee

BytePro: Select One

Empower: Select One

DocVelocity: Select One

Paylocity: Select One

Salesforce: Select One.

Comments: Do see any additional training needed for this area? Is the employee proficient in all applicable systems?

Are there still any challenges the team member has with the system? What are the challenges?

Solution to Challenges:

Answer the following questions to determine if this employee will be successful in their role and their employment should continue with the company: Include as many details as possible and use Action Plan to help you determine the next steps:

Has the employee met all the expectations of the job and is a valuable team member?

Has the team member gained all the necessary skills (Customer Service/Organizational and job-related skills) to be successful in their position?

Do you think that they still need any additional training? Any in the future? Explain:

Has the department transitioned well with the team member? Do they work well together? Describe:

Do you think that the workload for the employee is reasonable/too much/or too little? Explain:

Do you think this employee is successful in their role? If not, please explain:

If the employee is not successful even with more training discuss with HR on next steps to release the employee at this stage.

If the employee meets expectations and there are no action items to share, skip this next step

Summary Action Plan on Areas of Concern/Opportunity and Any Additional Training Still Needed for Employee to Succeed:

List of Areas of Concern/Weaknesses:	
How will you address the concerns?	
Will there be a need for additional tools to help the employee?	
What Additional Training is needed if any to improve performance?	
How will the training be provided?	
Who will provide the training?	
What is the Timeline?	