

Overall

Employee Overall Evaluation

**Calculated Rating:** 4.29

**Rating:** Exceeds Expectations (EE)

**Comment:** As one of the ABC's tech leaders leading nearly 50 team members, I have successfully implemented initiatives that advances ABC Tech's strategic goal to become Axos Bank's trusted innovation and engineering center. Through data-driven management, systematic talent development, and AI adoption, I have positioned ABC for sustained excellence and expanded capabilities. My leadership has delivered measurable impact across multiple dimensions: Getting closer to the goal of ABC Tech as a Banking & Financial Services center of excellence with demonstrated AI innovation leadership, achieving comprehensive engineering excellence through continuous team development, and building sustainable team capabilities that support long-term growth. Key achievements include implementing engineering metrics, and dashboards for data-driven continuous improvements, reducing onboarding time from one month to 1-2 weeks through process optimization, fostering high team retention with zero/low low performers, and developing emerging leaders across all team functions. I have consistently demonstrated strategic thinking by breaking down complex organizational challenges into actionable components, utilizing individual team strengths to optimize collective performance, and maintaining a long-term perspective. My approach balances accountability with empowerment, creating an environment where team members drive strategic initiative ownership while receiving my support for professional development. While I recognize opportunities for continued growth, my leadership has established a foundation of engineering excellence, AI-powered innovation, and collaborative culture that positions ABC Tech for expanded capabilities, increased delivery autonomy, and strengthened technical leadership within Axos Bank. Moving forward, I am committed to building upon this momentum to deliver even greater value and impact.

Goals

Accelerating Banking & Financial Services Mastery & AI Innovation

Position ABC Tech as center of excellence in Banking and Financial Services (BFS), and AI-powered innovation, enabling faster development, cost efficiency, and greater ownership of Axos strategic projects and initiatives.

**Due Date:** 06/30/2025      **Status:** Completed      **Completion Date:** 06/30/2025

**Category:** Strategic Initiative

**Organization Alignment:**

**Minimum:** 20.00%  
**Target:** 30.00%  
**Maximum:** 100.00%  
**Actual:** 50.00%

Employee Evaluation

**Rating:** Exceeds Expectations (EE)

**Comment:** As Tech leader leading almost 50 people, I have consistently demonstrated strategic leadership that aligns with ABC Tech's objective to become Axos Bank's trusted innovation and engineering center. Through systematic talent development, AI innovation leadership, and establishing financial domain expertise, I have guided the team to achieve greater performance standards while positioning ABC Tech as a center of excellence for banking and financial services delivery.

## Engineering Excellence & Team Development

Achieve engineering excellence through faster, high-quality feature delivery, minimizing defects, reducing rework, and strengthening AI/automation-driven development. Build empowered, accountable teams with enhanced versatility and skills advancement, driving participation in upskilling initiatives, and cross-functional collaboration.

**Due Date:** 06/30/2025      **Status:** In Progress      **Completion Date:**

**Category:** Strategic Initiative, Operational Initiative

**Organization Alignment:**

**Minimum:** 50.00%  
**Target:** 75.00%  
**Maximum:** 100.00%  
**Actual:** 90.00%

### Employee Evaluation

**Rating:** Substantially Exceeds Expectations (SE)

**Comment:** Established comprehensive engineering excellence and team development framework achieving exceptional results across all dimensions of technical delivery performance, team empowerment, and skills advancement:

Engineering metrics are available thru Power BI (And dashboard being built) which was regularly presented to Anna, and the team. [https://bofifederalbank.sharepoint.com/:fl:/g/contentstorage/CSP\\_af32088a-ce58-4e84-b02f-2ce4665e93c3/EVcAUNUXrFJlnath6jSm6aAB-bu8hmSEwQcrE4I5nFBPOA?e=utd0vW&nav=cz0IMkZjb250ZW50c3RvcmlkZSUYRkNTUF9hZjMyMDg4YS1jZTU4LTRlODQtYjAyZi0yY2I](https://bofifederalbank.sharepoint.com/:fl:/g/contentstorage/CSP_af32088a-ce58-4e84-b02f-2ce4665e93c3/EVcAUNUXrFJlnath6jSm6aAB-bu8hmSEwQcrE4I5nFBPOA?e=utd0vW&nav=cz0IMkZjb250ZW50c3RvcmlkZSUYRkNTUF9hZjMyMDg4YS1jZTU4LTRlODQtYjAyZi0yY2I)

### Section Summary

## Employee Evaluation

**Calculated Rating:** 4.5  
**Rating:** Exceeds Expectations (EE)

## Competencies

### Dependability

Consistently demonstrates the Five Pillars of Character: trustworthiness, respect, responsibility, fairness, and caring. Meets commitments, works independently, accepts accountability, handles change, sets personal standards, stays focused under pressure, and meets attendance/punctuality requirements. Genuinely emotionally invested in work and creates an uplifting environment for self and others.

### Employee Evaluation

**Rating:** Exceeds Expectations (EE)

**Comment:** As a leader, I consistently demonstrate trustworthiness and accountability, guiding a team of nearly 50

through strategic leadership and coaching. I take full responsibility for our team's performance, maintaining focus under pressure, and fostering continuous growth and high retention. By setting clear standards for excellence and prioritizing team development, we achieve outstanding results with no team members falling below performance expectations. This approach ensures systematic leadership development and a positive, uplifting environment.

## Problem Solving/ Analysis

Makes decisions based on facts. Breaks down problems into smaller components, understands underlying issues, can simplify and process complex issues, and understands the difference between critical details and unimportant facts. Utilizes and builds upon the strengths of team members to optimize problem solving.

### Employee Evaluation

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**Rating:** **Substantially Exceeds Expectations (SE)**

**Comment:** I consistently apply systematic problem-solving and analytical thinking to complex engineering and organizational challenges. I break down strategic objectives into actionable components, as demonstrated by continuously transforming ABC Tech into an AI-powered BFS center of excellence. I utilize team member strengths effectively, driving continuous growth in leadership development. My data-driven approach to team delivery performance management and process improvement has resulted in measurable outcomes including reduction in defect-related rework and consistent improvements in development lead time.

## Productivity

Manages a fair workload, volunteers for additional work, prioritizes tasks, develops clear and comprehensive work procedures, manages time well, and promotes the sharing of knowledge. Seeks new experiences that expand knowledge in one or more areas of work.

### Employee Evaluation

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**Rating:** **Meets Expectations (M)**

**Comment:** I expertly manage multiple teams while leading AUC's daily operations, consistently driving growth and enhancing talent acquisition, onboarding, and cross-functional collaboration. I have streamlined our onboarding process, reducing it from one month to 1-2 weeks, and implemented data-driven team performance management. Additionally, I foster knowledge sharing through bi-weekly brownbag sessions. I continuously seek new experiences in AI, financial domain expertise, and emerging technologies to effectively guide team learning and development.

## Results Focus

Delivers comprehensive work on-time, intelligently, and efficiently directs efforts. Takes responsibility for own actions and individual success or failure.

### Employee Evaluation

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**Rating:** **Meets Expectations (M)**

**Comment:** I take full ownership of team performance outcomes, achieving high team performance standards, AI tool adoption, and establishing ABC Tech as a BFS center of excellence. I efficiently direct efforts by aligning individual strengths with organizational goals, resulting in measurable improvements including reduction in development cycles, high performers, and leadership development. I take responsibility for both individual and team success, creating accountability frameworks that enable consistent performance across all team roles and functions.

## Team Leadership

Knowledge of leadership practices and processes; ability to use strategies and skills to enlist others in setting, embracing and achieving objectives while having a long-term perspective of the future state of things and how to get there.

Employee Evaluation

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Rating: Exceeds Expectations (EE)

Comment: I demonstrate leadership practices and processes in transforming ABC Tech into Axos trusted innovation and engineering center. I effectively enlist team members in setting and achieving strategic goals, evidenced by the continuous team performance improvements. I maintain a long-term perspective aligned with ABC Tech Strategy 2025, successfully positioning the team for expanded strategic capabilities, increased delivery autonomy, and strengthened technical leadership. My leadership approach has resulted in developing emerging leaders, establishing comprehensive AI adoption, creating a culture of accountability and collaboration, and building sustainable team capabilities that support continued growth and excellence.

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Section Summary

Employee Evaluation

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Calculated Rating: 3.8

Rating: Meets Expectations (M)