

Overall

Manager Overall Evaluation

Calculated Rating: 3.37
Rating: Meets Expectations (M)
Comment:

Development Focus and Specific Actions

- Communication cadence: adopt daily async status + end-of-day handoff when applicable; weekly stakeholder summary.
- Metrics linkage: instrument 2–3 personal metrics (lead time, rework, review iterations) and report trends.
- Knowledge patterns: publish solution playbooks for recurring issues and share in brown-bags.
- Domain Knowledge: propose and implement 1–2 AI/BFS enhancements with measurable impact.

Recognition

Recognition for stakeholder alignment flexibility and consistent teammate support. Consider spotlight in team forum for operational automations and knowledge sharing.

Solid contributor with reliable delivery, strong problem solving, and notable stakeholder alignment adoptability. Communication predictability and metric-backed impact will elevate influence and consistency. Forward trajectory is positive with clear path to sustained exceed outcomes.

Employee Overall Evaluation

Calculated Rating: 3.08
Rating: Meets Expectations (M)
Comment:

Acknowledgement

Manager

Status: Acknowledge Review
Comment:

Employee

Entered by: Ronald Bucayan Date: 08/13/2025
Status: Acknowledge Review
Comment:

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: 100.00%

Manager Evaluation

Rating: Meets Expectations (M)
Comment: Demonstrates steady domain learning and practical AI exploration within current scope. Next: deepen direct application in sprint deliverables.

Employee Evaluation

Rating: Meets Expectations (M)
Comment: Over the course of this cycle, I made consistent progress in deepening my understanding of the banking and financial services domain while exploring the integration of AI technologies. I completed several targeted learning initiatives, including:

- **Outsystems Mentor Program** – Studied how Outsystems AI capabilities can be applied to real-world use cases, particularly in the financial services sector.
- **Udemy Courses** – Completed *"The Complete Guide to the Global Capital Markets"* and *"Introduction to Financial Products & Services"*, which enhanced my foundational knowledge of financial instruments, market structures, and banking products.
- **Microsoft Copilot Integration** – Actively used Microsoft Copilot in daily development tasks to improve code efficiency, generate boilerplate code, and explore AI-assisted logic structuring.

These efforts have equipped me with a stronger grasp of both the technical and

business aspects of financial services, aligning with the goal of accelerating mastery and innovation. While there is still room for deeper application and impact, I believe my progress meets expectations for this cycle.

Additional Manager Evaluation

Achieve Engineering Excellence

Achieve engineering excellence through faster, high-quality feature delivery, minimizing defects, reducing rework, and strengthening AI/automation-driven development.

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

Category: Strategic Initiative

Organization Alignment:

Minimum: 50.00%
Target: 80.00%
Maximum: 100.00%
Actual: 0.00%

Manager Evaluation

Rating: Meets Expectations (M)

Comment: Supports quality cadence and operational guardrails. Next: drive measurable adoption across functional team and surface 2–3 metrics trends (defect/rework/lead time) tied to owned improvements.

Employee Evaluation

Rating: Meets Expectations (M)

Comment: During this cycle, I contributed meaningfully to initiatives that promote engineering excellence by supporting process improvements and quality standards. Key contributions include:

- **Deployment Checklist & Code Quality Standards** – Provided technical support and shared insights during the creation of these guidelines, helping ensure they align with best practices and are practical for day-to-day implementation. This initiative supports consistent, high-quality code delivery across the team.
- **Defect Prevention Initiative** – Actively collaborated with the team leading this effort by offering feedback and suggestions aimed at identifying root causes of defects and improving development workflows. My involvement helped reinforce a culture of continuous improvement and proactive quality assurance.

These efforts reflect a solid commitment to improving engineering practices and team-wide standards. While there is still room to deepen impact through broader adoption and metrics tracking, I believe my contributions meet the expectations for this goal.

Empowered & Accountable Teams

Build a culture of engagement, accountability, and collaboration, where every team member actively contributes to the success of ABC Strategy.

Due Date: 01/31/2025 Status: Completed Completion Date: 06/30/2025

Category: Strategic Initiative, Operational Initiative, Compliance/Risk Mitigation

Organization Alignment:

Minimum: 50.00%

Target: 50.00%

Maximum: 100.00%

Actual: 100.00%

| Manager Evaluation | | Employee Evaluation | |
|--------------------|--|---------------------|---|
| Rating: | Meets Expectations (M) | Rating: | Meets Expectations (M) |
| Comment: | Ronald has played a pivotal role in improving deployment efficiency and reducing dependencies for the ABC APW OS team . His leadership in technical solutions, combined with his ability to manage workload effectively , has resulted in improved project delivery and increased stakeholder confidence . | Comment: | Throughout this cycle, I contributed to building a more empowered and accountable team environment by initiating practical solutions that improved communication, time management, and team engagement. Key milestones include: <ul style="list-style-type: none">• Planned Monthly Brown-Bag Sessions for the ABC Tech Team – These sessions encouraged continuous learning and knowledge sharing in a relaxed setting, strengthening team collaboration and engagement.• Developed an Automated Weekly Timesheet Reminder – This reduced the need for manual follow-ups and ensured timely submission of work hours, supporting operational efficiency and accountability. These initiatives reflect a consistent effort to support team productivity and cohesion. While there is still room to scale these efforts further, I believe the progress made aligns well with the expectations for this goal. |

Recruitment & Talent Excellence

Recruitment & Talent Excellence

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

Category: Strategic Initiative, Operational Initiative, Cost Reduction/Mitigation

Organization Alignment:

Minimum: 50.00%
Target: 50.00%
Maximum: 100.00%
Actual: 100.00%

Manager Evaluation

Rating: **Meets Expectations (M)**

Comment: Ronald has made **outstanding contributions** to streamlining **onboarding and recruitment processes**. By creating a structured **onboarding plan**, optimizing **checklists**, and **automating key recruitment steps**, he has significantly **reduced onboarding time from a month to just two weeks**. His efforts in **gathering applicant feedback and refining recruitment workflows** have helped enhance the **overall hiring experience and operational efficiency**.

Employee Evaluation

Rating: **Meets Expectations (M)**

Comment: Although I was not directly involved in recruitment operations, I contributed to the success of the **Recruitment & Talent Excellence** goal through indirect support and collaboration. Key contributions include:

- **Supported Recruitment Initiatives Through Team Collaboration** – Ensured timely coordination and responsiveness within the team, helping maintain momentum in the hiring process and supporting the achievement of recruitment KPIs.
- **Maintained Operational Readiness to Support Talent Growth** – By consistently delivering on my responsibilities and maintaining high performance, I helped create a stable and efficient environment that supports onboarding and team expansion efforts.

These contributions, while indirect, played a role in enabling the team to meet its recruitment and talent goals.

Additional Manager Evaluation

Stakeholder Engagement & Visibility

Improve transparency and engagement with Axos leadership.

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

Category: Strategic Initiative, Operational Initiative, Cost Reduction/Mitigation

Organization Alignment:

Minimum: 50.00%
Target: 50.00%
Maximum: 100.00%
Actual: 100.00%

Manager Evaluation

Rating: **Exceeds Expectations (EE)**

Comment: Flexible alignment and proactive engagement improved trust and cycle time for clarifications. Next: institutionalize a concise

Employee Evaluation

Rating: **Meets Expectations (M)**

Comment: To strengthen stakeholder engagement and increase visibility, I made intentional efforts to align with leadership and support broader

weekly stakeholder summary linking progress, risks, and next steps.

team initiatives. Key contributions include:

- **Night Shift Adjustment for Leadership Engagement** – I proactively shifted to a night schedule to ensure direct engagement with Axos leadership. This allowed for real-time collaboration, timely updates, and stronger relationship-building across time zones.
- **Support for Dual-Shift Initiative** – I actively supported and helped plan the implementation of a two-shift work model. This initiative aimed to improve team responsiveness, ensure broader coverage, and enhance visibility with stakeholders across different regions.

These efforts reflect a strong commitment to stakeholder alignment and operational flexibility. While there are opportunities to further expand visibility through more structured reporting or feedback loops, I believe my contributions meet the expectations for this goal.

Additional Manager Evaluation

Section Summary

Manager Evaluation

Calculated Rating: 3.2
Rating: Meets Expectations (M)

Employee Evaluation

Calculated Rating: 3
Rating: Meets Expectations (M)

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.

Manager Evaluation

Rating: Exceeds Expectations (EE)
Comment: Reliability and ownership are strong, with helpful operational automations. Next: expand proactive status updates signaling to reduce follow-up.

Employee Evaluation

Rating: Meets Expectations (M)
Comment: Throughout this cycle, I consistently demonstrated dependability by delivering on my responsibilities, meeting deadlines, and supporting team initiatives. I ensured timely completion of tasks, such as creating weekly milestone reminders and automating timesheet notifications, which contributed to team accountability and operational efficiency. Additionally, I adjusted my work schedule to align with leadership availability, showing flexibility and commitment to team and stakeholder needs. These actions reflect a reliable and consistent work ethic that

meets expectations for this competency.

Additional Manager Evaluation

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.

Manager Evaluation

Rating: **Exceeds Expectations (EE)**
Comment: Strong analytical approach with practical solutions. Next: document solution patterns and convert into reusable guidance for everyone in the team.

Employee Evaluation

Rating: **Exceeds Expectations (EE)**
Comment: I consistently demonstrated strong analytical thinking and a proactive approach to problem-solving throughout this cycle. I actively sought opportunities to improve processes, optimize workflows, and contribute to team-wide solutions. My ability to assess challenges, think critically, and offer practical, forward-thinking recommendations has positively impacted both team efficiency and output quality. I regularly go beyond addressing immediate issues by identifying root causes and proposing sustainable improvements, which reflects a high level of ownership and strategic thinking.

Additional Manager Evaluation

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.

Manager Evaluation

Rating: **Meets Expectations (M)**
Comment: Solid baseline productivity. Next: increase throughput on higher-value deliverables and quantify personal WIP and cycle time.

Employee Evaluation

Rating: **Meets Expectations (M)**
Comment: I consistently maintained a high level of productivity throughout the cycle by effectively managing my time, prioritizing tasks, and delivering quality outputs within deadlines. I demonstrated the ability to stay focused and organized, even when handling multiple responsibilities or shifting priorities. My proactive approach to work, combined with a strong sense of ownership, allowed me to contribute meaningfully to team goals and support broader initiatives. I regularly exceeded expectations in terms of output, responsiveness, and reliability, which reflects a strong commitment to performance excellence.

Additional Manager Evaluation

Results Focus

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

individual success or failure.

Manager Evaluation

Rating: Exceeds Expectations (EE)
Comment: Results orientation is evident. Next: attach measurable outcomes to 2–3 deliverables (e.g., reduction in rework, lead-time improvements).

Employee Evaluation

Rating: Meets Expectations (M)
Comment: I consistently maintained focus on achieving key objectives and delivering expected outcomes. I ensured that tasks were completed on time and aligned with team and organizational goals. While I met performance expectations and contributed to successful project execution, I recognize opportunities to further enhance impact by driving more measurable results and taking on higher-value deliverables. Overall, my performance reflects a solid commitment to achieving results in a reliable and consistent manner.

Additional Manager Evaluation

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.

Manager Evaluation

Rating: N/A (Only use for Competency Rating)
Comment: Strengthen delegation and shared ownership as interim lead.

Employee Evaluation

Rating: N/A (Only use for Competency Rating)
Comment: As an interim team lead, I've effectively supported the team by facilitating task coordination, promoting collaboration, and ensuring alignment with goals. I've taken initiative in resolving issues, guiding teammates, and maintaining open communication. While I'm still growing in this role, I've met expectations by stepping up when needed and keeping the team on track.

Additional Manager Evaluation

Section Summary

Manager Evaluation

Calculated Rating: 3.75
Rating: Meets Expectations (M)

Employee Evaluation

Calculated Rating: 3.25
Rating: Meets Expectations (M)