

Overall

Employee Overall Evaluation

Calculated Rating: 2.99

Rating: Needs Development (ND)

Comment: Thank you for another year and looking forward.

Goals

Execute on Zenith Legacy Roadmap

Execute Zenith Legacy initiatives

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

Category: Operational Initiative, Compliance/Risk Mitigation

Organization Alignment:

Minimum: 10.00%

Target: 100.00%

Maximum: 100.00%

Actual: 90.00%

Employee Evaluation

Rating: Exceeds Expectations (EE)

Comment: I consistently surpass performance expectations through my initiative, independence, and deep understanding of my role. I deliver high-quality work on time with minimal supervision and demonstrates strong ownership of both successes and challenges.

Execute on Zenith product roadmap

Execute on Zenith product roadmap

Due Date: 12/31/2024 Status: In Progress Completion Date:

Category: Strategic Initiative

Organization Alignment:

Minimum: 50.00%

Target: 100.00%

Maximum: 100.00%

Actual: 90.00%

Employee Evaluation

Rating: Needs Development (ND)

Comment: I am frequently on the lookout for novel ways to organize my work and fulfill my duties.

I remain committed to my professional growth for which I have taken training courses specific to the skills in which I acknowledge a need for improvement.
I am always eager to collaborate with others in my field and learn from them.
I stay updated with the latest trends, innovations and developments in my field.
I approach each challenge with originality and constantly come up with imaginative solutions.

Execute on Zenith Product Roadmap

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Due Date: 12/31/2024 **Status:** In Progress **Completion Date:**

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Financial Management

Manage cost centers, manage/control/limit commercial IT spend, collaborate with Commercial Finance Strategic goals

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Improve Banking Services Availability and Reliability

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Modernization of Zenith Platform (SI 3334)

Development of key Axos engineering deliverables and technical support to Ascendion

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

Category: Operational Initiative, Compliance/Risk Mitigation

Organization Alignment:

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Target: 100.00%

Maximum: 100.00%

Actual: 20.00%

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Operations - Productivity

Ensure development teams are productive according to agreed enterprise criteria

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Operations - Quality

Quality of development and testing are below agreed quarterly thresholds

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Process Improvement and Risk Mitigation

Process Improvement and Risk Mitigation

Due Date: 12/31/2024 Status: In Progress Completion Date:

Category: Operational Initiative

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Productivity

Keeping team members effecti

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Safety and Soundness (Compliance/Audit)

Ensure no major compliance, OCC, international audit findings or significant losses, and resolve any findings per deadline

defined in Archer

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Category: Compliance/Risk Mitigation

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Section Summary

Employee Evaluation

Calculated Rating: 2.67
Rating: Needs Development (ND)

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: I consistently models trust, respect, and accountability. I meets commitments, adapts well to change, and stays focused under pressure. My positive energy uplifts the team and reflects genuine care for my work and colleagues.

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

Rating: Meets Expectations (M)
Comment: I makes sound, fact-based decisions and breaks down complex problems into manageable parts. I distinguishes critical details from noise and leverages team strengths to drive effective problem-solving.

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

Rating: **Exceeds Expectations (EE)**

Comment: I manages my workload effectively, takes initiative, and prioritizes tasks well. I develops clear processes, uses time efficiently, shares knowledge openly, and actively seeks opportunities to grow his expertise.

Results Focus

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

Employee Evaluation

Rating: **Exceeds Expectations (EE)**

Comment: I consistently delivers high-quality work on time and directs my efforts with focus and efficiency. I takes full ownership of my actions and outcomes, demonstrating strong accountability.

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

Rating: **N/A (Only use for Competency Rating)**

Comment: N/A

Section Summary

Employee Evaluation

Calculated Rating: **3.75**

Rating: **Meets Expectations (M)**