

Overall

Employee Overall Evaluation

Calculated Rating: 3.44
Rating: Meets Expectations (M)
Comment: This is all I can do for now but my next target will include studying and using AI and incorporate it into my work.

Goals

Execute on Zenith Legacy roadmap

Execute on Zenith Legacy roadmap

Due Date: 12/31/2025 Status: In Progress Completion Date:
Category: Strategic Initiative
Organization Alignment:
Minimum: 1.00%
Target: 100.00%
Maximum: 100.00%
Actual: 75.00%

Employee Evaluation

Rating: Meets Expectations (M)
Comment: in progress

Execute on Zenith Product Roadmap

Execute on Zenith Product Roadmap

Due Date: 12/31/2025 Status: In Progress Completion Date:
Category: Operational Initiative
Organization Alignment:
Minimum: 1.00%
Target: 100.00%
Maximum: 100.00%
Actual: 50.00%

Employee Evaluation

Rating: Exceeds Expectations (EE)
Comment: Zenith roadmap executed as planned.

Financial Management

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

Due Date: 12/31/2025 Status: In Progress Completion Date:

Category: Operational Initiative

Organization Alignment:

Minimum: 1.00%
Target: 100.00%
Maximum: 100.00%
Actual: 75.00%

Employee Evaluation

Rating: **Meets Expectations (M)**

Comment: still in progress

Financial Management

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

Due Date: 12/31/2025 Status: In Progress Completion Date:

Category: Strategic Initiative

Organization Alignment:

Minimum: 1.00%
Target: 100.00%
Maximum: 100.00%
Actual: 75.00%

Employee Evaluation

Rating: **Exceeds Expectations (EE)**

Comment: We are way lower than the budget and we don't have any unplanned expenses.

Improve Banking Services Availability and Reliability

Improve Banking Services Availability and Reliability

Due Date: 12/31/2025 Status: In Progress Completion Date:

Category: Operational Initiative

Organization Alignment:

Minimum: 1.00%
Target: 100.00%
Maximum: 100.00%
Actual: 75.00%

Employee Evaluation

Rating: **Meets Expectations (M)**

Comment: Meet some of the milestones

Improve Banking Services Availability and Reliability

Improve Banking Services Availability and Reliability

Due Date: 12/31/2025 Status: In Progress Completion Date:

Category: Operational Initiative

Organization Alignment:

Minimum: 1.00%
Target: 100.00%
Maximum: 100.00%
Actual: 1.00%

Employee Evaluation

Rating: Exceeds Expectations (EE)
Comment: We don't have production bugs and no high production issues.

Modernization of Zenith Platform (SI 3334)

Modernization of Zenith Platform (SI 3334)

Due Date: 12/30/2025 Status: In Progress Completion Date:

Category: Strategic Initiative

Organization Alignment:

Minimum: 1.00%
Target: 100.00%
Maximum: 100.00%
Actual: 75.00%

Employee Evaluation

Rating: Meets Expectations (M)
Comment: still in progress

Operational Initiatives & Continuous improvement

Operational Initiatives & Continuous improvement

Due Date: 12/30/2025 Status: In Progress Completion Date:

Category: Operational Initiative

Organization Alignment:

Minimum: 1.00%
Target: 100.00%
Maximum: 100.00%
Actual: 50.00%

Employee Evaluation

Rating: Meets Expectations (M)

Comment: In progress

Process Improvement and Risk Mitigation

Compliance/ Risk Mitigation

Due Date: 12/31/2025 Status: In Progress Completion Date:

Category: Operational Initiative

Organization Alignment:

Minimum: 1.00%

Target: 100.00%

Maximum: 100.00%

Actual: 50.00%

Employee Evaluation

Rating: Meets Expectations (M)

Comment: still in progress

Process Improvement and Risk Mitigation

Process Improvement and Risk Mitigation

Due Date: 12/31/2025 Status: In Progress Completion Date:

Category: Operational Initiative

Organization Alignment:

Minimum: 1.00%

Target: 100.00%

Maximum: 100.00%

Actual: 1.00%

Employee Evaluation

Rating: Meets Expectations (M)

Comment: Meet some of the milestones

Productivity

Keeping team members effective

Due Date: 12/31/2025 Status: In Progress Completion Date:

Category: Operational Initiative

Organization Alignment:

Minimum: 1.00%

Target: 100.00%

Maximum: 100.00%

Actual: 50.00%

Employee Evaluation

Rating: **Meets Expectations (M)**

Comment: still in progress

Productivity

Keeping team members effective

Due Date: 12/31/2025 Status: In Progress Completion Date:

Category: Operational Initiative

Organization Alignment:

Minimum: 1.00%

Target: 100.00%

Maximum: 100.00%

Actual: 50.00%

Employee Evaluation

Rating: **Exceeds Expectations (EE)**

Comment: Exceeds some of the milestones

Safe and Soundness (Compliance/Audit)

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

Due Date: 12/31/2025 Status: In Progress Completion Date:

Category: Compliance/Risk Mitigation

Organization Alignment:

Minimum: 1.00%

Target: 100.00%

Maximum: 100.00%

Actual: 1.00%

Employee Evaluation

Rating: **Meets Expectations (M)**

Comment: meet some of the milestones

Section Summary

Employee Evaluation

Calculated Rating: 3.31

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.

Employee Evaluation

Rating: **Exceeds Expectations (EE)**

Comment: Always been my commitment.

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: **Exceeds Expectations (EE)**

Comment: Every decisions I made was made on facts and numbers to be more accurate.

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: **Meets Expectations (M)**

Comment: We always share information in the team.

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: Always trying to finish my PBI before the deadline.

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)**