

PHARMACORP ANNUAL PERFORMANCE REVIEW 2024

EMPLOYEE INFORMATION

Name: Sarah Chen

Employee ID: #001

Position: Sales Executive

Department: Sales

Review Period: January 1, 2024 - December 31, 2024

Manager: David Kim, Sales Director

Review Date: January 10, 2025

PERFORMANCE SUMMARY

Overall Rating: 3/5 (Meets Expectations)

Sarah has demonstrated solid sales performance throughout 2024, consistently meeting her targets. However, work-life balance challenges have impacted her overall engagement and long-term career satisfaction.

KEY ACCOMPLISHMENTS 2024

Sales Performance

Target Achievement: Met 102% of annual sales quota (\$6.1M vs \$6.0M target)

New Client Acquisition: Successfully onboarded 8 new pharmaceutical accounts

Product Launch Support: Led Northeast region launch for CardioMax therapeutics

Client Retention: Maintained 94% client retention rate across portfolio

Professional Development

Territory Expansion: Successfully integrated Boston Metro territory into existing portfolio

Training Completion: Completed advanced pharmaceutical sales certification

Mentorship: Provided guidance to 2 new sales representatives

PERFORMANCE METRICS

Metric	Target	Achieved	Rating
Annual Sales Revenue	\$6.0M	\$6.1M	Meets Expectations
New Client Acquisition	6	8	Exceeds Expectations
Client Retention Rate	90%	94%	Exceeds Expectations
Product Knowledge Assessment	85%	87%	Meets Expectations

AREAS FOR DEVELOPMENT

Work-Life Balance Concerns

Primary Challenge: Employee has expressed significant concerns about work-life balance

Impact: Increased stress levels affecting overall job satisfaction

Contributing Factors: Extended travel requirements, weekend client events, overtime demands

Professional Growth

Opportunity: Interest in transitioning to strategic account management

Development Need: Enhanced negotiation and contract management skills

Leadership Potential: Demonstrated capability in mentoring junior staff

Action Plan

1. Q1 2025: Implement flexible work arrangements to improve work-life balance
 2. Q2 2025: Enroll in strategic account management training program
 3. Q3 2025: Reduce travel frequency by 25% through territory optimization
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CAREER DEVELOPMENT DISCUSSION

Employee Feedback: Sarah expressed strong concerns about current workload impact on personal life. Indicated interest in exploring internal opportunities with better work-life balance.

Manager Recommendation: While Sarah's performance remains solid, immediate action needed to address work-life balance concerns to prevent attrition. Recommend consideration for strategic accounts role with reduced travel.

Retention Risk: High - Employee satisfaction scores indicate potential departure risk without intervention.

COMPENSATION REVIEW

Current Salary: \$5,993/month

Recommended Increase: 5% merit increase effective March 1, 2025

Bonus Achievement: Earned 103% of target bonus (\$8,500)

Commission: \$47,200 annual commission earned

Stock Options: Not currently eligible (requires Level 3 or above)

IMPROVEMENT PLAN

Immediate Actions (30 days)

Schedule weekly check-ins with direct manager

Implement flexible work-from-home policy (2 days/week)

Reassess territory travel requirements

Short-term Goals (90 days)

Complete work-life balance assessment
Explore internal transfer opportunities
Begin strategic account management certification

Long-term Development (12 months)

Transition to senior sales role with strategic accounts focus
Achieve work-life balance satisfaction score of 3+
Complete leadership development program

MANAGER COMMENTS

Sarah remains a valuable contributor to our sales team with strong technical knowledge and client relationship skills. However, her expressed concerns about work-life balance require immediate attention. We must take proactive steps to address these issues to retain this talented professional.

The sales department recognizes the demanding nature of our current territory structure and is committed to implementing changes that support employee wellbeing while maintaining performance standards.

EMPLOYEE ACKNOWLEDGMENT

Employee Comments: I appreciate the open discussion about work-life balance challenges. I am hopeful that the proposed changes will allow me to continue contributing effectively while maintaining personal wellbeing. I look forward to exploring the strategic accounts opportunity.

Development Priorities: Focus on achieving better work-life integration and advancing toward strategic account management role.

SIGNATURES

Employee: _____ **Date:** _____
Sarah Chen

Manager: _____ **Date:** _____
David Kim, Sales Director

HR Review: _____ **Date:** _____
Patricia Kim, HR Business Partner

Follow-up Review Scheduled: March 15, 2025