

Employee Name : Rekha Deshmukh

Manager's Name : S. Sriram

Goalsheet Of Year: 2017-2018

KRA Category : Process

KRA Weightage : 25

KRA Description : Commission, Discount, Debt & Credit note processing, short receipt issues, LC Docs tracking

Key Performance Indicator (KPI) description	Unit	KPI Weightage	Value	(1) Unsatisfactory Performance	(2) Needs Improvement	(3) Good Solid Performance	(4) Superior Performance	(5) Outstanding Performance
Preparing commission and discount approval and report on monthly basis, clearing of discount payable G/L	Text			not done	within 1 month	within 3 weeks	within 2 weeks	within 10 days
Ensuring that commissions should be accounted with proper supporting, doc from vendors and providing all details and necessary approvals to accounts Dept	Text			not done	within 1 month	within 3 weeks	within 2 weeks	within 10 days
checking G/L account of commission payable if anything pending for transfer to respective vendor account	Text			not done	done in six months	once in every qtr 1st mth before finish of next qtr	once in every qtr before finish of rx qtr	once in every qtr before finish of rx qtr
Checking of LC and preparation 7 submission of docs as per LC terms to the Bank	Text			not done	late submission	within 21	days from supply	within 10 days from supply
Tracking of LC bills payment receipt from finance dept and necessary action for discrepancy issues/ extra charge deducted by bank etc	Text			not done	after 10 days	within 7 days from due date of LC bill	within 3 days for due date of LC bill	next day

KRA Category : Business

KRA Weightage : 25

KRA Description : DEBTORS OVERDUE TRACKING, TOTAL COLLECTION DETAILS REPORTING, ASSISTANCE IN PROVISION FOR BAD DEBTS ETC

Key Performance Indicator (KPI) description	Unit	KPI Weightage	Value	(1) Unsatisfactory Performance	(2) Needs Improvement	(3) Good Solid Performance	(4) Superior Performance	(5) Outstanding Performance
Preparation of overdue outstanding and reviewing on weekly basis	Text			not sent	fortnightly sent	on weekly basis	within 3 days	on daily basis
Preparation of collection plan on a monthly basis and providing the weekly plan status to accounts Dept	Text			not prepared	providing weekly plan with a delay of 15 days	providing weekly plan with delay of 1	2 days	providing weekly plan at the beginning of every week
Reporting of daily collection to accounts Dept and ensuring that no credit recd amt is left for accounting	Text			after 1 week	within 3 days	within 2 days	within 1 day	on a daily basis
Preparation of w/off & w/back list provision for bad debts etc	Text			not sent	list made byut not approved	once in a year	twice a year	once in every qtr
Reviewing Cr period on a qtrly basis	Text			not sent	once a year	on half yearly basis	on a qtrly basis	on a monthly basis

KRA Category : People
KRA Weightage : 15
KRA Description : Follow up for payments, couriering of Invoices

Key Performance Indicator (KPI) description	Unit	KPI Weightage	Value	(1) Unsatisfactory Performance	(2) Needs Improvement	(3) Good Solid Performance	(4) Superior Performance	(5) Outstanding Performance
Following up with customer for critical payments	Text			never done	within 15 days of OD sheet circulation	within 10 days of OD sheet circulation	within 7 days of OD sheet circulation	within 1 or 2 days
Couriering of Invoices recd from the factory in the absence of personnel	Text			not done	within 10 days	within 1 week	within 2 or three days	immediately
Coordinating with customers/S. Tax Dept for clarification of commission/Taxes/old Overdues	Text			not done	within 15 days	within 10 days	within 7 days	immediately

KRA Category : Customer
KRA Weightage : 20
KRA Description : Customer account related issues

Key Performance Indicator (KPI) description	Unit	KPI Weightage	Value	(1) Unsatisfactory Performance	(2) Needs Improvement	(3) Good Solid Performance	(4) Superior Performance	(5) Outstanding Performance
Reco with customer accounts for any difference in OD amt	Text			not done	within 1 week	three days	within 2 days	on same day
Processing refund request after checking receipt of req forms	Text			not done	within 15 days	within 7 days	within 5 days	within 3 days
Short receipt issues communications	Text			not made	within 10 days	once in every week OD report and separate mail to MM no sooner we know abt short receipt	sorted out immediately	recovered money
Regularisation of short receipt thru issue of proper DR/CR note	Text			not regularised in spite of confirmations recd	regularised with delay of more than 1 mth	within 7 days after receipt of confirmation regarding reason and approval	within 5 days	within 3 days

KRA Category : Process
KRA Weightage : 15
KRA Description : Commission, Discount, Debt & Credit note processing, short receipt issues, LC Docs tracking

Key Performance Indicator (KPI) description	Unit	KPI Weightage	Value	(1) Unsatisfactory Performance	(2) Needs Improvement	(3) Good Solid Performance	(4) Superior Performance	(5) Outstanding Performance
Preparing commission and discount approval and report on monthly basis. clearing of discount payable G/L	Text			not done	within 1 month	within 3 weeks	within 2 weeks	within 10 days
Ensuring that commissions should be accounted with proper supporting, doc from vendors and providing all details and necessary approvals to accounts Dept	Text			not done	within 1 month	within 3 weeks	within 2 weeks	within 10 days
checking G/L account of commission payable if anything pending for transfer to respective vendor account	Text			not done	done in six months	once in every qtr 1st mth before finish of next qtr	once in every qtr before finish of nx qtr	once in every qtr before finish of nx qtr
Checking of LC and preparation & submission of docs as per LC terms to the Bank	Text			not done	late submission	within 21	15 days from supply	within 7 to 10 days from supply
Tracking of LC bills payment receipt from finance dept and necessary action for discrepancy issues/ extra charge deducted by bank etc	Text			not done	after 10 days	within 7 days from due date of LC bill	within 3 days from due date of LC bill	next day

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Individual Development Plan (WI.CHR.03 F.NO. 1)

Employee Name	Manager's name	Employee ID	Year
Rekha Deshmukh	S. Sriram	10000729	2017-2018

Please discuss your strengths and work related weaknesses with your manager and identify your training needs. Your development will happen through the following ways:

Part A: Development through Instructor led training in Classroom

No	Name of program	Faculty	Days	Please explain why the training is needed
1	Training on ISO 9001 & 15000 **	ASHOKRAO PATIL	1	This is mandatory
2	Environment Health and Safety *	Sunil Katekari	1	This is mandatory
3	Prevention of Sexual Harassment *		1	This is mandatory
4	Effective Communication Skills	Charles Carvalho	2	
5	The Super Manager	Amit Sanas	2	
6	Six Thinking Hats		1	
7	Art of Charm	Anant Pednekar	1	

*Mandatory for all employees to attend this program

**Mandatory for employees working at locations covered by the certifications

If you need a program that is not mentioned above, please use the space below. Please note this program may be offered if at least 20 people request for it.

No	Topics required	No. of Days	Internal faculty name
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1			
2			

Note: Part B and Part C are to be filled by only AGM and above employees.

Part B: Development through developmental relationships

No	Relationship	Name of leader	Number of Meetings planned	Target date	Program Completed	Reviews
1	Coaching through leader in own function for functional inputs					
2	Coaching through leader in own function for functional inputs					

Part C: Development through action learning projects

Project Title	
Review date	
Target end date	
Project scope	
Project exclusions	
Project deliverables (Target at rating 3: good solid performance)	
What is the employee expected to learn from this project	
Reviewer(s) name	
Project Status	

Project Status Comments	
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