



# Gabriella WHITE

4Q2022 Quarterly Conversation and 2022 Annual Review

Review Period 11/15/2021 - 11/13/2022



REVIEWER

Cather Cheese (Manager)

**Justin Pope**

Software Developer  
Position

Cather Cheese  
Manager

## 2022 Core Values

### Rating Scale

Score	Rating	Description
5	5 - Exceeds Expectations	Is self-directed, works independently with minimal coaching, routinely performs well beyond maximum level of proficiency or competence, consistently exceeds performance expectations in quality and timeliness
4	4 - Meets and Sometimes Exceeds Expectations	Frequently exceeds or performs at expectation, occasionally surpasses maximum level of proficiency or competence, quality and timeliness, requires occasional direction or coaching
3	3 - Meets Expectations	Produces acceptable work products, performs at expected level of proficiency or competence and timeliness, requires some direction and coaching, may need help assigning the correct priorities and determining right course of action
2	2 - Needs Improvement	Performance is usually at or meets job requirements, however the need for further development and improvement is clear, requires more than normal time to coach and correct work, either does not complete assignments, or completes assignments, but cannot be relied upon to complete them with acceptable quality, on time and/or without significant rework
1	1 - Does Not Meet Expectations	Developmental approaches have been utilized without success, employee is either unwilling or unable to do the job, performance must significantly and immediately improve with sustained and continuous improvement

**Dedication - We are passionate and committed to our work. We go above and beyond and do whatever it takes to exceed customer expectations. Related Fundamentals: (1) Provide a genuine and warm greeting, (3) Furnish the customer (or coworker) with a solution, (12) Do what is best for the customer (or coworker), (23) Invest in relationships and (24) Do Whatever It Takes**

Reviewer	Rating
Justin Pope ( Self )	4 - 4 - Meets and Sometimes Exceeds Expectations
Cather Cheese ( Manager )	4 - 4 - Meets and Sometimes Exceeds Expectations

### Previous Responses

**Justin Pope ( Self )**

**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 3Q2022 Quarterly Conversation - **Date :** 8/23/2022

**Cather Cheese ( Manager )**

**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 3Q2022 Quarterly Conversation - **Date :** 9/9/2022

**Justin Pope ( Self )**

**Rated :** 3 - 3 - Meets Expectations - **Review :** 2Q2022 Quarterly Conversation - **Date :** 4/20/2022

**Cather Cheese ( Manager )**

**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 2Q2022 Quarterly Conversation - **Date :** 6/6/2022

**Enthusiasm - We have a positive attitude. We look forward to the opportunities that each new day presents us. Related Fundamentals: (6) Stay true to the brand, (7) Create a distinct and compelling experience, (8) Innovate without fear and (10) Be the expert**

Reviewer	Rating
Justin Pope ( Self )	4 - 4 - Meets and Sometimes Exceeds Expectations
Cather Cheese ( Manager )	4 - 4 - Meets and Sometimes Exceeds Expectations

#### Previous Responses

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**Cather Cheese ( Manager )**

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**Cather Cheese ( Manager )**

**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 2Q2022 Quarterly Conversation - **Date :** 6/6/2022

**Synergy - We believe in the power of teamwork. We embrace diversity and believe combined contributions create greater team success. Related Fundamentals: (4) Build a trusting relationship, (15) Assume positive intent, (16) Show meaningful appreciation, (17) Treat each other like family, (18) Listen generously, (19) Practice blameless problem solving, (22) Think team first and (30) Keep things fun.**

Reviewer	Rating
Justin Pope ( Self )	4 - 4 - Meets and Sometimes Exceeds Expectations
Cather Cheese ( Manager )	5 - 5 - Exceeds Expectations

#### Previous Responses

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**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 3Q2022 Quarterly Conversation - **Date :** 8/23/2022

**Cather Cheese ( Manager )**

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**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 2Q2022 Quarterly Conversation - **Date :** 4/20/2022

**Cather Cheese ( Manager )**

**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 2Q2022 Quarterly Conversation - **Date :** 6/6/2022

**Integrity - We believe in humility, honor, trustworthiness, fiscal responsibility and doing right by God. We only discuss company issues with those that can help solve the issue. Related Fundamentals: (9) Think Safe Work Safe, (20) Honor commitments, (21) Speak courageously, (28) Avoid surprises and (29) Act with integrity.**

Reviewer	Rating
Justin Pope ( Self )	3 - 3 - Meets Expectations
Cather Cheese ( Manager )	3 - 3 - Meets Expectations

#### Previous Responses

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**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 3Q2022 Quarterly Conversation - **Date :** 8/23/2022

Cather Cheese ( Manager )

**Rated :** 3 - 3 - Meets Expectations - **Review :** 3Q2022 Quarterly Conversation - **Date :** 9/9/2022

Justin Pope ( Self )

**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 2Q2022 Quarterly Conversation - **Date :** 5/17/2022

Cather Cheese ( Manager )

**Rated :** 3 - 3 - Meets Expectations - **Review :** 2Q2022 Quarterly Conversation - **Date :** 6/6/2022

**Goal-Oriented - We get the future we plan for. We believe in striving for and delivering exceptional results. Related Fundamentals: (5) Make quality personal, (11) Get clear on expectations, (13) Pay attention to the details, (26) Think and act like an owner and (27) Get the future you plan for.**

Reviewer	Rating
Justin Pope ( Self )	4 - 4 - Meets and Sometimes Exceeds Expectations
Cather Cheese ( Manager )	4 - 4 - Meets and Sometimes Exceeds Expectations

#### Previous Responses

Justin Pope ( Self )

**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 3Q2022 Quarterly Conversation - **Date :** 8/23/2022

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**Nimble - We are flexible, embrace change and move at a swift pace. We react quickly to ever-changing market demands. Related Fundamentals: (2) Identify the opportunity, (14) Be a fanatic about response time and (25) Be relentless about improvement.**

Reviewer	Rating
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Cather Cheese ( Manager )	4 - 4 - Meets and Sometimes Exceeds Expectations

#### Previous Responses

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**Rated : 4 - 4 - Meets and Sometimes Exceeds Expectations - Review : 2Q2022 Quarterly Conversation - Date : 6/6/2022**

## 2022 Roles and Metrics

### Rating Scale

Score	Rating	Description
5	5 - Exceeds Expectations	Is self-directed, works independently with minimal coaching, routinely performs well beyond maximum level of proficiency or competence, consistently exceeds performance expectations in quality, timeliness and quality of work completed
4	4 - Meets and Sometimes Exceeds Expectations	Frequently exceeds or performs at expectation, occasionally surpasses maximum level of proficiency or competence, quality and timeliness, requires occasional direction or coaching
3	3 - Meets Expectations	Produces acceptable work products, performs at expected level of proficiency or competence and timeliness, requires some direction and coaching, may need help assigning the correct priorities and determining right course of action
2	2 - Needs Improvement	Performance is usually at or meets job requirements, however the need for further development and improvement is clear, requires more than normal time to coach and correct work, either does not complete assignments, or completes assignments, but cannot be relied upon to complete them with acceptable quality, on time and/or without significant rework
1	1 - Does Not Meet Expectations	Developmental approaches have been utilized without success, employee is either unwilling or unable to do the job, performance must significantly and immediately improve with sustained and continuous improvement

### Roles - Rate your performance for the review period.

Reviewer	Rating
<b>Justin Pope ( Self )</b>	3 - 3 - Meets Expectations
<b>Cather Cheese ( Manager )</b>	4 - 4 - Meets and Sometimes Exceeds Expectations

### Comments

**Justin Pope ( Self ) :**

-Development of custom software and integrations:

Continue developing SugarCRM and Snowflake integrations

-Support of existing applications and integrations

Continue support and maintaining systems by being on call and addressing issues as they arise.

-Documenting software and integrations

Documents created:

Email System

SugarCRM updates

Address verification changes

**Cather Cheese ( Manager ) :**

Development of custom software and integrations: There is no project too big or small that Justin is not willing to jump in and figure out a solution. He has done a great job with SugarCRM and getting the data correct within the integration's points

Support of existing applications and integrations -- Justin is part of our IT support on-call and monitors the system for a week once a month this includes weekend and nights.

Documenting software and integrations -- Justin continues to aid in the documentation of our core process by creating technical specifications for major code changes and larger projects

#### Previous Responses

**Justin Pope ( Self )**

**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 3Q2022 Quarterly Conversation - **Date :** 8/23/2022

- Development of customer software and integrations

+ This is my primary job function and what my responsibilities are

> Talend process

X SugarCRM

X Snowflake

> SQL maintenance

X Have been able to manage SQL errors from being on call

> Help develop code base standards

- Support of existing applications and integrations

+ Have supported Meagan with SugarCRM integrations and manage the data feed

+ Have supported David Sowell and Raghu with integrations to Snowflake

- Documenting software and integrations

+ Documented SugarCRM integration as a whole

+ more documents in progress to be published

**Cather Cheese ( Manager )**

**Rated :** 3 - 3 - Meets Expectations - **Review :** 3Q2022 Quarterly Conversation - **Date :** 9/9/2022

- Development of custom software and integrations -- This quarter Justin closed 32 production tasks and 23 of these tasks involved change controls promotions which is 72 % percent overall performance in developing and modifying software and integrations. The majority of Justin's work would be defined as Major code changes since 14 of the 23 change controls promotions total 61% of his work effort this quarter.

•

- Support of existing applications and integrations -- Justin is on-call once every 5 weeks and support job errors and/or application errors. He also supports changes to Talend and SugarCRM

- 
- Documenting software and integrations -- Justin completed technical documentation for SugarCRM
- 

**Justin Pope ( Self )**

**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 2Q2022 Quarterly Conversation - **Date :** 5/17/2022

I currently don't have any roles listed on the Accountability chart. I have been able to complete several tickets and learn processes that will be my primary job responsibility.

I have also meet the challenge for the Split Shipping project.

I believe that I am meeting expectations and will be able to fully grasp my role in the coming quarter.

**Cather Cheese ( Manager )**

**Rated :** 4 - 4 - Meets and Sometimes Exceeds Expectations - **Review :** 2Q2022 Quarterly Conversation - **Date :** 6/6/2022

- Development of custom software and integrations
- Support of existing applications and integrations
- Documenting software and integrations

**Metrics - Rate your performance for the review period.**

Reviewer	Rating
Justin Pope ( Self )	3 - 3 - Meets Expectations
Cather Cheese ( Manager )	3 - 3 - Meets Expectations

**Comments**

**Justin Pope ( Self ) :**

Can do better with metrics that have been established.

**Cather Cheese ( Manager ) :**

Metrics can improve. The focus should be on providing dates and make the deliverable date within 3 days or less.

**Previous Responses**

**Justin Pope ( Self )**

**Rated :** 2 - 2 - Needs Improvement - **Review :** 3Q2022 Quarterly Conversation - **Date :** 8/23/2022

Benchmark Estimate

- I still need to work on the project management portion of my job and managing my time.

Production Accuracy

- I believe I was meet expectations on this metric as most of my deployments were good with few errors

**Cather Cheese ( Manager )**

**Rated :** 3 - 3 - Meets Expectations - **Review :** 3Q2022 Quarterly Conversation - **Date :** 9/9/2022

Benchmark Estimate -- The goal is to score 80 points within the quarter. Justin scored 35 points which is only 43% , this needs to improve concerning a benchmark estimate should be completed on 50% of the developer workload, which would have been 80 points, this is also due to the team lost two resource during this quarter which left Justin with supporting Talend with little knowledge and he needed to focus on learning this tool to support our integrations for Snowflake and

## SugarCRM

Production Accuracy -- The goal for the quarter is to score 85%. Justin score 150%, this exceeds expectations

**Justin Pope ( Self )**

**Rated** : 3 - 3 - Meets Expectations - **Review** : 2Q2022 Quarterly Conversation - **Date** : 4/20/2022

I have not been assigned Metrics yet.

I'll be able to meet this in the following quarter.

**Cather Cheese ( Manager )**

**Rated** : 3 - 3 - Meets Expectations - **Review** : 2Q2022 Quarterly Conversation - **Date** : 6/6/2022

NO metric new employee, we discussed metric for next quarter

## 2022 Rocks

### Rating Scale

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1	1 - Does Not Meet Expectations	Developmental approaches have been utilized without success, employee is either unwilling or unable to do the job, performance must significantly and immediately improve with sustained and continuous improvement

**Rate your overall rock performance for the time period. If you have no Rocks assigned, select Meets Expectations.**

Reviewer	Rating
<b>Justin Pope ( Self )</b>	3 - 3 - Meets Expectations
<b>Cather Cheese ( Manager )</b>	3 - 3 - Meets Expectations



## Comments

### Justin Pope ( Self ) :

Address verification: Changes have been documented and can proceed with handing out actionable work

Branch Consolidation: Rock has been on hold as requirements on a business level have been changing.

SugarCRM Open Orders: Changes are ready and waiting for Approval

SugarCRM Invoice Data: Changes are ready and waiting for Approval

### Cather Cheese ( Manager ) :

Address verification: Completed the required milestones

Branch Consolidation: This project gets changing

SugarCRM Open Orders: This project was implemented

SugarCRM Invoice Data: This project was implemented but had to be reversed. Focus on making sure the requirements are clear and plan better when creating the technical specs

## Previous Responses

### Justin Pope ( Self )

**Rated** : 3 - 3 - Meets Expectations - **Review** : 3Q2022 Quarterly Conversation - **Date** : 8/23/2022

SugarCRM Open Order Project (SDM:24497) | Not Finished

+ Sugar development was unsteady as priorities were constantly changing

+ As of the end of the quarter solid priorities were able to be established and executed on. Developments will be completed next quarter.

New eCat fields order import changes and export to CSV functionality | Marked Finished

+ eCat fields on order import were deployed and completed

+ CSV functionality was deemed 'not attainable'

SmartyStreets address verification changes to eCat import and export | Not Finished

+ development on this was not able to be completed.

+ SmartyStreets changes were made and requirements are able to be established

Syspro Upgrade Support | On Going

+ Support was provided

+ Syspro v8 was not able to be made this quarter

Talend Learning | Marked Finished

+ Completed this rock and fully got up to speed with Talend development

### Cather Cheese ( Manager )

**Rated** : 3 - 3 - Meets Expectations - **Review** : 3Q2022 Quarterly Conversation - **Date** : 9/9/2022

SugarCRM Open Order Project (SDM:24497) | Not Finished

+ The priorities changes on Sugar through the quarter, but Justin meet the expectations of the business user for SugarCRM

New eCat fields order import changes and export to CSV functionality | Marked Finished

+ the task that was defined was completed

SmartyStreets address verification changes to eCat import and export | Not Finished

+ This task was waiting on Syspro to complete there part, so it was moved to next quarter

Syspro Upgrade Support | Completed

+ Syspro support was completed but additional issue found in testing which caused the project to be delayed to next quarter

Talend Learning | Marked Finished

+ Completed and did a great job on documentation

**Justin Pope ( Self )**

**Rated** : 3 - 3 - Meets Expectations - **Review** : 2Q2022 Quarterly Conversation - **Date** : 4/22/2022

No Rocks were given to me this quarter. Rocks will be assigned next quarter.

**Cather Cheese ( Manager )**

**Rated** : 3 - 3 - Meets Expectations - **Review** : 2Q2022 Quarterly Conversation - **Date** : 6/6/2022

No ROCKS, new employee

## 2022 Performance Summary

**Strengths and Key Accomplishments - examples of achievements from the review period such as WIT moments, committee involvement, additional projects, cross-functional team assistance, new skills learned, your reasons to celebrate in the review period**

### Comments

**Justin Pope ( Self ) :**

I believe I am a strong team member and reliable to help when needed. I have solidified my place with owning systems and technologies as well as developing or helping develop new systems:

- SugarCRM
- Snowflake
- Talend
- SQL Knowledge
- Email System
- FTP system
- Developmental standards

**Cather Cheese ( Manager ) :**

Justin a solid well-round employee. Great attitude, skillful and a pleasure to work with. He is willing to help anyone.

## Previous Responses

**Justin Pope ( Self )**

**Review :** 3Q2022 Quarterly Conversation - **Date :** 8/23/2022

I have been able to establish my self as a key member to this team and be expert in areas of the business. Areas of expertise:

- > Talend
- > SugarCRM
- > Snowflake integrations
- > SQL Server management
  - Table, Procedure and function development and management
  - On call responsibilities

**Cather Cheese ( Manager )**

**Review :** 3Q2022 Quarterly Conversation - **Date :** 9/9/2022

Justin has proven himself to be an owner of his work. He jumped right in with the task of learning Talend and SugarCRM, now he is the go to person for these applications. Justin is a great team player and has a positive attitude. He has become a go to person for me to bounce ideas off of and help structure some of our processes on the development team. He is organized and writes neat, clean, and readable code. He prides himself with getting it right the first time.

**Justin Pope ( Self )**

**Review :** 2Q2022 Quarterly Conversation - **Date :** 4/22/2022

Most of the work that I have done in this quarter was learning the different processes that I will need to know.

Processes:

- 1) eCat export 2) Sugar export 3) Syspro Service and Business Object APIs

**Cather Cheese ( Manager )**

**Review :** 2Q2022 Quarterly Conversation - **Date :** 6/6/2022

Very strong developer and excellent analytical skills.

Key Accomplishments --- Freight and Surcharge splitting.

**Do you Get It, Want It, and Have the Capacity to Do It? Does the employee understand the responsibilities of the position, the culture, the systems, the pace, how the job comes together, and possess the aptitude, natural ability and understanding of the ins and outs of the job? Does the employee genuinely like the position, appreciate working for the company in the position and sincerely want to do the duties required of the position? Does the employee have the time as well as the mental, physical and emotional capacity to do the job well, with or without reasonable accommodation?**

## Comments

**Justin Pope ( Self ) :**

**Get It:** I am a good fit for this company and the team I am with.

**Want It:** I enjoy the system development and technology that I am working with.

**Have the Capacity to Do It:** I have the capacity to do the job.

**Cather Cheese ( Manager ) :**

Yes

#### Previous Responses

**Justin Pope ( Self )**

**Review :** 3Q2022 Quarterly Conversation - **Date :** 8/23/2022

**Get It:** I am fully on board with my position and responsibilities here and Gabrielle White. I am a good fit for this company and the team I am with.

**Want It:** I enjoy the system development and technology that I am working with.

**Have the Capacity to Do It:** I have the capacity to do the job.

**Cather Cheese ( Manager )**

**Review :** 3Q2022 Quarterly Conversation - **Date :** 9/9/2022

Yes, Justin get the job and understands the culture and expectations of his job to perform well. He is capable, and has exceeded the expectation in a short period of time. He want the job and has proven it by stepping up to the challenges the time faced with losing two resources in the same quarter

**Justin Pope ( Self )**

**Review :** 2Q2022 Quarterly Conversation - **Date :** 4/22/2022

**Get It:** I am still getting familiar with the company processes and what my position is responsible for.

**Want It:** I do want this. The company is showing care and effort for the individual employee. I value and appreciate that the company is doing this. I want to be able to be a valuable member of the group here at Gabriella White.

**Have the Capacity to Do It:** I am still on the learning curve and still getting to know the company and people here, but I am more than willing and able to do the job that is required.

**Cather Cheese ( Manager )**

**Review :** 2Q2022 Quarterly Conversation - **Date :** 6/6/2022

Yes Justin has learned the business quickly, He is passion about his job, he has the ability to do it.

**Plan to get on track - reflect on what did not go as planned and how you intend on getting these items back on track. i.e., rocks, other projects, attendance issues, organization, communication, production or quality results. Provide ideas, tools and/or resources to address these issues for improvement and be SMART in providing the plan to improve.**

#### Comments

**Justin Pope ( Self ) :**

Continue improving scope on what I can accomplish and how a task needs to be accomplished. Not focusing on a perfection by wasting time but being able to accomplish the task at hand in an efficient manner. Working on learning delegation with the new contractors will help.

**Cather Cheese ( Manager ) :**

Looking ahead... Now that Justin has gotten SugarCRM integration working smoothly, he can start to focus other systems,

his business knowledge will expand by working on more accounting production and learning M-File so he will be the point person for the template creation

#### Previous Responses

**Justin Pope ( Self )**

**Review :** 3Q2022 Quarterly Conversation - **Date :** 8/23/2022

#### **Project Management**

It was too easy to dive into development and start making changes before outlining what is needed and documentation. Taking a step back from systems and take the time to get and document requirements is what I am going to work on before development.

**Cather Cheese ( Manager )**

**Review :** 3Q2022 Quarterly Conversation - **Date :** 9/9/2022

Justin wants to get it all completed and right all at one time, which is great but this method can introduce chaos and stress. This quarter for Justin to get back on track he needs to stay focus on the priorities, taking the time to plan and assess his assignments, outline the work in the form of a technical documentations and follow the task thru to completion. Try not to tackle too many task at one time.

Cather will work with him during our one/one to set priorities for the week so those priorities will remain the same until they are completed. The team has started having some development sessions which will help structure the team to get consistence at our process, in return will help Justin to write flexible code and less maintenance of existing code. I believe this will help improve the “jumping” from task to task without getting results. Results defined as completion of the task in a timely manner .

**Justin Pope ( Self )**

**Review :** 2Q2022 Quarterly Conversation - **Date :** 5/17/2022

The Freight and Surcharge Split Ship project was not handled with great effeciency. I believe I can do better with managing comminications with stakeholders.

**Cather Cheese ( Manager )**

**Review :** 2Q2022 Quarterly Conversation - **Date :** 6/6/2022

Focus on ROCKS, Talend training/learning, take a digger dive into Sugar.

**Growth and Development – specific areas where growth and development can be increased to improve performance and provide progression in current position or future career pathing - i.e., additional training such as an LMS course, a certification or license, cross-training or professional development course, etc.**

#### Comments

**Justin Pope ( Self ) :**

Documentation, Project Management

**Cather Cheese ( Manager ) :**

Continue to work on documentation, time management and following the change control methodologies

## Previous Responses

**Justin Pope ( Self )**

**Review :** 3Q2022 Quarterly Conversation - **Date :** 8/23/2022

Project Management

Documentation

Communication

Continue to learn the business

**Cather Cheese ( Manager )**

**Review :** 3Q2022 Quarterly Conversation - **Date :** 9/9/2022

Time Management and Documentation.

**Justin Pope ( Self )**

**Review :** 2Q2022 Quarterly Conversation - **Date :** 4/22/2022

I can continue learning the IT processes to support the business.

**Cather Cheese ( Manager )**

**Review :** 2Q2022 Quarterly Conversation - **Date :** 6/6/2022

Continue to learn the business

## Summary

### Overall Rating

#### 4Q2022 Quarterly Conversation and 2022 Annual Review

Justin Pope

### 4 - Meets and Sometimes Exceeds Expectations

	Self Review	Supervisor Review, Discussion, and Acknowledgement
2022 Core Values	3.6 / 5.0 3 - Meets Expectations	4.0 / 5.0 4 - Meets and Sometimes Exceeds Expectations
2022 Roles and Metrics	3.0 / 5.0 3 - Meets Expectations	3.8 / 5.0 4 - Meets and Sometimes Exceeds Expectations
2022 Rocks	3.0 / 5.0 3 - Meets Expectations	3.0 / 5.0 3 - Meets Expectations
2022 Performance Summary	N/A	N/A

Overall

3.1 / 5.0  
3 - Meets Expectations

3.7 / 5.0  
4 - Meets and Sometimes Exceeds  
Expectations

## Acknowledgement

X Cather Cheese  
Supervisor

12/16/2022  
Date

### Comments

**Cather Cheese ( Manager ) :**  
Great Employee