



Performance Management Template

28 Apr 2023 / Georgina Vaughn - Head of Customer Success

Complete

| Score | 0% | Flagged items | 0 | Actions | 2 |
|-----------------------|---|---------------|---|---------|---|
| Purpose | Comprehensive Performance Management | | | | |
| Conducted on | 28.04.2023 17:00 PST | | | | |
| Facilitated by | Georgina Vaughn - Head of Customer Success | | | | |
| Location | Wisconsin, USA (43.7844397, -88.7878678) | | | | |

Actions

2 actions

Performance Management / Documentation

Method/Format of Performance-Related Documentation and Submission

Performance-related documents will be submitted via email to the manager and saved to the cloud/shared drive folder. Any hard copies will be kept on file by the manager for future reference.

To Do | Assignee SafetyCulture Staff | Priority Low | Due 05.05.2023 19:06 PST | Created by SafetyCulture Staff

To the employee: Review our SOPs on sending emails that I shared with you via our group chat.

To Do | Assignee SafetyCulture Staff | Priority Low | Due 05.05.2023 19:06 PST | Created by SafetyCulture Staff

To the manager: Create a shared Drive folder for the employee where she can upload all relevant documentation.

Employee Details

Employee Name Kathy Liggins

Job Title Senior Sales Executive

Department Sales

Mentor/Manager Name Georgina Vaughn

Performance Goal Setting and Expectations

1. List specific, measurable, achievable, relevant, and time-bound (SMART) performance goals for the employee.
2. Put N/A on fields that aren't relevant during the time of review or session.

Performance Goal and Expectation

Performance Goal and Expectation 1

Goal and Expectation

Increase sales by 15% in the next 12 months

Due Date/Next Review Date Last week of April 2024

Weight or Importance 20%

Performance Goal and Expectation 2

Goal and Expectation

Improve customer satisfaction rating by 5%

Due Date/Next Review Date Last week of October 2023

Weight or Importance 15%

Performance Goal and Expectation 3

Goal and Expectation

Increase the number of new clients by 10%

Due Date/Next Review Date Last week of March 2024

Weight or Importance 15%

Performance Goal and Expectation 4

Goal and Expectation

Attend at least two professional development events in the next six months

Due Date/Next Review Date

Last week of November 2023

Weight or Importance

10%

Performance Goal and Expectation 5

Goal and Expectation

Increase knowledge of product features and benefits

Due Date/Next Review Date

Last week of August 2023

Weight or Importance

10%

Performance Measurement

Put N/A on fields that aren't relevant during the time of review or session.

KPIs and Other Metrics

KPIs and Other Metrics 1

KPI/Metric

Sales growth rate

Target or Expected Performance Level

15%

Measurement/Assessment Method

Sales reports and analysis
(quantitative and qualitative)

KPIs and Other Metrics 2

KPI/Metric

Customer satisfaction rating

Target or Expected Performance Level

90%

Measurement/Assessment Method

Customer surveys and
feedback (quantitative and
qualitative)

KPIs and Other Metrics 3

KPI/Metric

New client acquisition rate

Target or Expected Performance Level

10%

Measurement/Assessment Method

Sales reports and analysis
(quantitative and qualitative)

KPIs and Other Metrics 4

KPI/Metric

Participation in professional development events

Target or Expected Performance Level

20%

Measurement/Assessment Method

Event attendance records
(quantitative)

KPIs and Other Metrics 5

KPI/Metric

Product knowledge assessment score

Target or Expected Performance Level

90%

Measurement/Assessment Method

Product knowledge test
(qualitative)

Feedback and Coaching

Put N/A on fields that aren't relevant during the time of review or session.

Mode of Feedback

One-on-one meetings with
mentor/manager

Frequency of Feedback

Monthly

Coaching and Development Opportunities

- Sales training and workshops
 - Professional development events and conferences
 - Mentorship and coaching sessions with experienced sales executives
-

Performance Review

Put N/A on fields that aren't relevant during the time of review or session.

Performance Review Date

Last week of April 2024

Method/Format (e.g., self-assessment, manager assessment, etc.)

Manager assessment

Upload or note any performance review forms or documents to be used/referred to.

The attached documents are from the previous quarter. Refer to these when conducting reviews on the next dates specified in this report.

[Customer Satisfaction Survey Results.pdf](#)

[Professional Development Records.pdf](#)

[Sales Performance Report.pdf](#)

Documentation

2 actions

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Development and Improvement Plan

Development Goals:

1. List specific developmental goals that focus on the employee's professional growth and skill development.
2. Put N/A on fields that aren't relevant during the time of review or session.

Specific Developmental Goals

Specific Developmental Goals 1

Developmental Goal

Improve public speaking skills by attending a public speaking course

Due Date/Next Review Date

Last week of June 2023

Weight or Importance

10%

Specific Developmental Goals 2

Developmental Goal

Enhance leadership skills by attending a leadership development program

Due Date/Next Review Date

Last week of September 2023

Weight or Importance

15%

Specific Developmental Goals 3

Developmental Goal

Develop proficiency in a new software program relevant to the job

Due Date/Next Review Date

Last week of December 2023

Weight or Importance

10%

Completion

Other Notes and Recommendations

Most of the goals discussed and stated herein span more than 3 months until the next review date. This way, Georgina can have ample time to work on the set goals and expectations according to the identified KPIs. On my end as her manager and mentor, I'll be providing support on training and other resources she may need along the way. From time-to-time, I'll also challenge her progress to help her step up and be more creative on how she'll be able to pace toward her goals.

Employee Signature



Georgina Vaughn
28.04.2023 19:07 PST

Mentor/Manager Signature



Kathy Liggins
28.04.2023 19:07 PST

Media summary

[Customer Satisfaction Survey Results.pdf](#)

[Professional Development Records.pdf](#)

[Sales Performance Report.pdf](#)