**Completed Performance Appraisal Form**

**Employee Name**: Terry Jones **Position**: Marketing Manager  
**Supervisor Name**: Meredith Smith **Department**: Marketing  
  
**Date of employee self-assessment**: November 15, 2021  
**Date of manager assessment**: December 5, 2021

***Instructions:*** *Employees are to complete a self-assessment and submit it to their manager no later than November 15. Managers are to complete their assessment and submit it to Human Resources by December 5.*

**Rating scale:**

 5 Excellent (consistently exceeds standards)

 4 Outstanding (frequently exceeds standards)

 3 Satisfactory (generally meets standards)

2 Needs improvement (frequently fails to meet standards)

1 Unacceptable (fails to meet standards)

**SECTION 1: OBJECTIVES: Overall Section Rating: 3.7**

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| Objective | Action Items | Outcomes |
| Increase number of marketing qualified leads by 15% over prior EOY results. | Lead team to create buyer persona profiles for ideal prospects by Feb. 1.  Develop and execute 10-15 “top of funnel” marketing campaigns to generate interest and action from qualified prospects by Dec. 31.  Track and report on MQL results on a weekly and quarterly basis to adjust campaigns as needed to achieve the objective. | Four buyer personas were completed on Jan. 30.  Fifteen new campaigns were implemented across trade shows, online advertising campaigns and a monthly webinar.  MQLs were tracked and reported on weekly. MQLs increased 17.5% over prior EOY results. |

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| **Employee Rating: 5** | **Manager Rating: 5** |
| **Employee Comments:** The objective was exceeded, and all action items were met and completed on time. Even with one vacant position in the fourth quarter, the team put in extra hours and was able to exceed the goal. | **Manager Comments:** Terry did a great jobin designing the action plans and being responsive to needed plan changes. She reassigned and prioritized the workflow when one team member left in the fourth quarter, leading her team to exceed the objective. Plan designs developed this year will be used going forward to build on this success. |

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| Objective | Action Items | Outcomes |
| Increase conversion rate of marketing qualified leads to sales qualified leads by 5% over prior EOY results. | Develop four nurturing campaigns to engage, educate and inform marketing qualified prospects, at least one per quarter.  Modify/enhance campaigns or programs to shorten conversion time by conducting tests on buyer personas.  Work with inside sales team to further qualify leads before passing on to field sales team. | Four nurturing e-mail campaigns were launched, targeting our four buyer personas, one per quarter. Conducted two targeted webinars in the first and third quarters.  Conducted quarterly tests on buyer personas by varying e-mail frequency and consolidating/spreading out content delivery as warranted. Identified frequencies that consistently increased conversion rates for each persona.  Worked with inside sales to refine the processes and timing for when they make first contact with a lead.  Overall, conversion rates to sales qualified leads were increased by 4.8%. |

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| **Employee Rating: 4** | **Manager Rating: 3** |
| **Employee Comments:** While developing and working with new personas, my team was still able to launch successful nurturing campaigns and better determine what frequency of contact showed initial improvements in conversion times. Again, even with one vacant position in the fourth quarter, we came very close to meeting the objective and feel positioned to exceed the rate next year. | **Manager Comments:** Terry led her team in making a great start to increasing the conversion rate of MQLs to SQLs, though they fell just short of the actual objective. This was a solid effort to incorporate new personas and testing frequencies and to build a more efficient process with the inside sales team. These efforts will continue into next year and show signs of being even more effective in years to come. |

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| Objective | Action Items | Outcomes |
| Increase number of followers on both Twitter and LinkedIn by 15%. | Enhance social media strategies by sharing at least six high-quality content pieces with each persona via social media.  Engage with industry influencers and build relationships to increase brand exposure.  Partner with industry associations and groups to sponsor social media events. | Each persona received two high-quality content pieces each quarter via Twitter and LinkedIn.  A spreadsheet was created to track identified influencers and to show progress in engagement efforts with each.  We sponsored two social media events with the leading industry association and organized bimonthly online webchats with interest groups.  Overall, followers on Twitter were increased by 22%, while LinkedIn followers increased by 10%. |

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| **Employee Rating: 3** | **Manager Rating: 3** |
| **Employee Comments:** This objective got off to a slower start than the others. We were still able to exceed the goal for Twitter followers but fell short on LinkedIn. With the need to rearrange some priorities, more time was spent on increasing our Twitter presence, so our LinkedIn presence suffered. More time dedicated to social media will be needed in the future to fully realize goals. | **Manager Comments:** As the number of followers increased for both platforms, these results are a success for the objective. Terry made note of the greater effects of more dedicated and consistent time spent on social media platforms and will utilize that knowledge going forward. Terry did a great job of leading her team to increase Twitter followers beyond the goal! |

**SECTION 2: GENERAL PERFORMANCE REQUIREMENTS: Overall Section Rating: 4**

1. **Job Knowledge** (Applies the technical and professional skills needed for the job.)

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| **Employee Rating: 5** | **Manager Rating: 5** |
| **Employee Comments:** Through experience and ongoing education, I bring a high level of marketing and technical skills to the job and keep pace with trends and changes in the industry to continuously improve marketing efforts. | **Manager Comments:** Terry is highly qualified and brings a great deal of experience to her role. She is proactive in staying on top of new marketing technologies, while also staying abreast of industry trends to increase her business acumen, which in turn increases her department’s contributions to the bottom line. Terry is a go-to person for the latest innovations and trends. |

**2. Communication Skills** (Listens effectively and provides information and guidance to individuals in an appropriate and timely manner.)

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| **Employee Rating: 4** | **Manager Rating: 4** |
| **Employee Comments:** I communicate well with my staff, providing weekly status updates on objectives and ongoing feedback to individuals on the team. I have an open-door policy and encourage my team to share opinions openly. | **Manager Comments:** Terry scores well on employee satisfaction and pulse surveys, with above average ratings from her group. When pressed for time, some weekly status updates have been late, but not to any extent to impede the team’s progress. |

**3. Management Skills** (Guides team to achieve desired results. Delegates responsibilities appropriately and effectively, while developing direct reports.)

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| **Employee Rating: 4** | **Manager Rating: 3** |
| **Employee Comments:** I successfully lead my team to achieve objectives by setting appropriate goals, determining workflow and assignments, and keeping the team on schedule. I encourage my team to bring any issues to me, and I resolve them quickly. | **Manager Comments:** Terry is an effective manager who is able to lead her team to achieve or exceed most objectives. While she has a good rapport with her team, she needs to make more time to develop her more inexperienced team members, which will only increase the functionality of the team. Terry will need to focus her efforts at the start of the year on hiring for the vacant position and on coaching current team members to improve their effectiveness. |

**4. Organizational Skills** (Sets appropriate objectives to meet commitments within budget. Establishes priorities and organizes workflow to meet objectives.)

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| **Employee Rating: 5** | **Manager Rating: 5** |
| **Employee Comments:** I take my financial responsibilities very seriously and always operate within budget. I set and plan my team’s action items at the start of the year, taking into consideration the availability of resources and the logical order in which tasks need to be done. Objectives are met or exceeded in most cases and completed on time. | **Manager Comments:** Terry has exceptional organizational skills. Whether it’s planning out how to deliver on an objective or organizing the use of her resources, she’s up for the task and delivers good-quality work on time. Terry has a remarkable capability in assisting with budget development and in planning work within that budget. All objectives this year were delivered within budget. |

**5.** **Initiative** (The degree to which an employee searches out new tasks and expands abilities professionally and personally.)

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| **Employee Rating: 3** | **Manager Rating: 3** |
| **Employee Comments:** I think I do a good job of taking initiative at the start of the year, when developing the action plans for my team, and also of staying on top of professional and industry trends. | **Manager Comments:** In terms of setting action plans and keeping the flow of work going, Terry meets all expectations. She also keeps abreast of applicable trends and applies them where possible. In the future, more initiative should be taken to get involved in the overall strategic plan, as opposed to focusing solely on annual objectives. This will help in her development for succession plan purposes. |

**SECTION 3: PROFESSIONAL DEVELOPMENT: Section Rating: 3**

Pursue the AMA Professional Certified Marketer in Digital Marketing certification by completing three to five LinkedIn Learning courses.

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| **Employee Rating: 3** | **Manager Rating: 3** |
| **Employee Comments:** I completed three courses in preparation for taking the Digital Marketing certification exam: Learning Conversion Rate Optimization; Advanced Google Analytics; and Optimizing Marketing E-Mails. | **Manager Comments:** Three online courses were completed in pursuit of the certification. Terry plans to take the exam next year. |

**OVERALL RATING: 4**

**Section 1 (40%): 3.7 Total Score: 3.68**

**Section 2 (40%): 4.0**

**Section 3 (20%): 3.0**

**Employee Signature:**   **Date:**

**Supervisor Signature: Date:**