

PERFORMANCE MANAGER

A	EMPLOYEE NAME	EMPLOYEE NAME	
	POSITION	SPECIALIST, BUSINESS DEVELOPMENT	
	RANK	STAFF LEVEL	
	APPRAISAL PERIOD	FROM: NOVEMBER 24, 2025	TO: APRIL 23, 2026
	PERFORMANCE MANAGER		
	PEER EVALUATOR		

SCORING MECHANICS

Quantitative Rating	Qualitative Rating
Rating: 96 - 100	EXCEPTIONAL - CONSISTENTLY EXCEEDS TARGETS
Rating: 86 - 95	ABOVE AVERAGE - EXCEEDS TARGETS IN SOME AREAS
Rating: 80 - 85	AVERAGE - MEETS TARGETS
Rating 61 - 79	BELOW AVERAGE - SOMETIMES MEETS TARGETS
Below 60	POOR - DOES NOT MEET TARGETS

ENCODE
COLUMN H

ENCODE IN GRAY AREA ONLY

B PERFORMANCE RESULTS (WHAT IS YOUR WORK OUTPUT?). SEE 70%

ACHIEVEMENT OF PERFORMANCE RESULTS	35%	0	0.00
The successful completion of assigned business development responsibilities within agreed timelines and quality standards. This includes supporting account renewals, preparing comparative benefit presentations, obtaining quotations from service providers, processing applications for insurance products, and assisting in the preparation of proposals and client documentation.			
ACCOUNTABILITY AND WORK RELIABILITY	20%	0	0.00
Demonstrates dependability and responsibility in completing assigned tasks and meeting deadlines. Ensures timely coordination with service providers, internal teams, and business partners while maintaining accurate monitoring of assigned accounts, proposals, and renewal activities.			
WORK SKILLS AND JOB KNOWLEDGE	15%	0	0.00
Possesses the required knowledge and skills to effectively perform business development functions. Demonstrates proficiency in proposal preparation, client presentations, research on potential clients, and use of company systems such as the Client Portal and IOM modules.			
ACCURACY AND ATTENTION TO DETAIL	15%	0	0.00
Ensures accuracy and completeness of proposals, quotations, reports, and client documentation. Carefully reviews data, plan benefits, and provider quotations to ensure information presented to clients and partners is accurate and properly			
COORDINATION, PROFESSIONALISM, AND CLIENT SERVICE	15%	0	0.00
Maintains professional communication and coordination with clients, service providers, and internal teams. Supports benefit orientation sessions, assists in marketing initiatives, and demonstrates professionalism, responsiveness, and customer-focused service in all interactions.			
SUBTOTAL			0.00

C COMPETENCIES (HOW DID YOU DELIVERY YOUR PERFORMAN RES 30%

PROFESSIONALISM	30%	0	0.00
The ability to demonstrate integrity, reliability, and ethical behavior while maintaining a high standard of work and interpersonal interactions.			
TEAMWORK AND COOPERATION	10%	0	0.00
The ability to work collaboratively with others, communicate effectively, and contribute to achieve common goals.			
COST CONSIUSNESS	10%	0	0.00
The ability to make informed decisions on matters that involves costs by recognizing and minimizing expenses while maximizing resource efficiency or			
INTERPERSONAL RELATIONS SKILLS	10%	0	0.00
The ability to interact and empathize with others, fostering positive relationships and collaboration both in personal and professional settings.			
CUSTOMER RELATIONSHIP SKILLS	10%	0	0.00
The ability to build and maintain strong, trust-based connections with customers.			
PERSONAL GROOMING AND CLEANLINESS	10%	0	0.00
The ability to maintain a professional appearance and hygiene, reflecting self-respect and commitment to the standards of the workplace.			
ATTENDANCE AND PUNCTUALITY	10%	0	0.00
Consistent practice of being present at work and arriving on time for work and meetings.			
COMMUNICATION SKILLS	10%	0	0.00
The ability to convey information clearly and effectively, listen actively and engage in meaningful discussion to facilitate understanding.			
SUBTOTAL			0.00

D AUTOMATIC CALCULATION OF PERFORMANCE APPRAISAL RATINGS - DO NOT FILL UP THIS AREA:

	WEIGHT	SCORE	RATING
PA RATING (PERFORMANCE MANAGER)			
PERFORMANCE RESULTS	70%	0.00	0.00
STAFF COMPETENCIES	30%	0.00	0.00
PA RATING (PERFORMANCE MANAGER)			0.00
% PM RATING TO TOTAL			90%
WEIGHTED RATING			-

	WEIGHT	SCORE	RATING
PA RATING (PEER APPRAISER)			
PERFORMANCE RESULTS	70%	0.00	0.00
STAFF COMPETENCIES	30%	0.00	0.00
PA RATING (PERFORMANCE MANAGER)			0.00

% PM RATING TO TOTAL	10%
WEIGHTED RATING	-

PM PERFORMANCE RATING - 90% WEIGHT	0.00
PEER APPRAISAL RATING - 10% WEIGHT	0.00
FINAL PA RATING	0.00

E. EMPLOYEE'S PARTICIPATION IN SPECIAL PROJECTS, TRAININGS

Special Projects	
Special Trainings	
Special or Rare Skills	

F. PERFORMANCE MANAGER: STAFF DEVELOPMENT PLANS

STRENGTHS

AREAS OF IMPROVEMENT

H. PERFORMANCE MANAGER'S RECOMMENDATION

TRAININGS REQUIRED

I. EMPLOYEE / RATEE'S COMMENTS: REFER TO YOUR EMPLOYEE PROFILE PAGE FOR ALIGNMENT

J. SIGNATURES

PERFORMANCE EVALUATORS

EMPLOYEE / RATEE

NAME AND SIGNATURE OF PERFORMANCE MANAGER
Date Signed:

EMPLOYEE NAME
NAME AND SIGNATURE OF EMPLOYEE/RATEE
Date Signed: