

Key Performance Indicators (KPI) Assessment Sheet

Employee Name:
Position:
Reviewer:

Jane Doe
Account Manager
John Smith

Department:
Assessment Period:
Date:

Sales & Marketing
Jan - Dec 2024
31 Dec 2024

KPI Assessment

| # | KPI Description | Target | Result | Weight (%) | Score |
|-------------|---------------------------------|------------|------------|------------|-------|
| 1 | Increase new client acquisition | 20 clients | 18 clients | 30 | 27 |
| 2 | Achieve sales revenue goal | \$500,000 | \$520,000 | 35 | 35 |
| 3 | Client retention rate | 90% | 85% | 20 | 17 |
| 4 | On-time reporting submission | 100% | 100% | 15 | 15 |
| Total Score | | | | | 94 |

Comments & Recommendations

Jane exceeded several targets, especially in sales revenue, and performed consistently in operational KPIs. Further development may focus on improving client retention through enhanced customer engagement strategies.

Important Notes

- This assessment is based on quantitative and qualitative data collected throughout the review period.
- KPI targets and weights should be agreed upon at the start of the period and tailored to individual roles.
- Scores are used to support performance appraisals and future development discussions.
- Confidential: For internal use only.