PETNET

A. EMPLOYEE INFORMATION

Employee Name:	**ARNIE C. SAYRE**	
Position:	**FRONT LINE ASSISTANT (FLA)**	**Level**

Type of Evaluation (Please check the appropriate box.) :

☐ 3rd MONTH   ☑ 5TH MONTH   ☐ MID-YEAR

B. INSTRUCTIONS:

1. Discuss and agree with staff on My Performance Plan (MPP) and My Growth Plan (MGP) at the start of the performanc

2. The Team Leader shall personally discuss with the Team member the results of the latter's appraisal.

3. The Team Leader, staff, and department head shall affix their respective signatures in the spaces provided at the end

4. HRD will analyze the ratings and conduct calibration session to ensure consistency.

C. RATING SCALE

		WHAT RATING SCALE (KPI/TARGETS)
5	**OUTSTANDING**	**FAR EXCEEDS expectations and requirements** by delivering exceptional results vs t and models the highest standards of how work is accomplished across organizational bo and within teams. Sought and adapted to increasingly challenging work.
4	**HIGHLY EFFECTIVE**	**Performance consistently met and frequently exceeded objectives and expecta** Adapted to increasingly challenging work while surpassing targets
3	**EFFECTIVE**	**Performance consistently met objectives and expectation**s, delivering the require the role
2	**MARGINAL**	**INCONSISTENT DELIVERY**. Performance met some objectives & expectations but fails deliver on others.
1	**UNSATISFACTORY**	**FALLS BELOW expectations and requirements**. Often misses deadlines and targets

D. WHAT FACTORS (70%) - INDIVIDUAL PERFORMANCE PLAN (PERFORMANCE OBJECTIVES)
   (As jointly agreed upon by Team Leader/Head and Team Member)

	BSC Perspective	Key Performance Indicators (KPI)	Target
1	**Financial**	AVP Income Target – As of Aug 21, 2024 – P241,507.72	100% AVP Revenue Attainment
		Branch Profitability/Revenue based on Net Income Before Tax (NIBT) as of July 2024 – P122,592	100% - profitable
		WU, Other Remco Targets (transaction) – Aug 21, 2024 YTD=Target – 4,940 , Actual – 4,601 = 93%	100%

2	**Customer**	Customer Engagement Rating (Will cover both Internal & External Customers/ Bida ka sa PeraHub)	100%
3	**Internal Efficiency**	Transaction Accuracy Rating	100%
		Regular Audit & Compliance Rating	100%
		Branch Physical Quality Rating / Marketing Audit Compliance	100%
4	**Learning & Growth**	FLA OnBoarding & Training (Transformation) / Bida ka Training /AMLA Training(% of Completed Set of Learning Programs, as applicable)	100%

TOTAL WHAT RATING

If there is any objective which was agreed upon after the Individual Performance Planning, please add as a

HOW FACTORS (30%) - CORE VALUES
(Show how goals are achieved in alignment with company's core values)

PERFORMANCE CRITERIA

1. INTEGRITY
● Delivers on what is promised.
● Practices fair processes and actions.
● Takes accountability for own actions and their consequences.
● Provides truthful and complete information.

2. RESPONSIBILITY
● Adheres to good corporate governance by complying with set policies.
● Performs due diligence check prior to submission of output to ensure quality.
● Shows responsible use of company time and assets.
● Escalates risks and issues to the right persons on time.

3. TEAMWORK
● Fosters high performance teamwork among members
● Promotes mutual respect to others.
● Works inter-dependently in solving organizational problems and issues.
● Shows sensitivity and mindfulness on the effect of own actions/behaviors to others.
● Share useful information and knowledge to others.
● Encourage regular communication, coordination & networking across functional boundaries

4. INNOVATION
● Constantly looks for newer and better ways to provide efficient services relevant to
   clients, employees, and partners.
● Initiates or suggests innovative ways on how to improve the way things are done.
● Updates oneself regularly on relevant trends and best practices.
● Translate adversity into opportunities for improvement

5. FRIENDLINESS

- Conducts business with warmth while maintaining respect & proper conduct in all aspect of jobs/operations.
- Take effort to know others and expand network within and outside the department.
- Deal with customers with warmth and a helping and caring disposition and attitude.
- Promotes Friendliness within and among his team and across the organization.

TOTAL HOW RATING	

F. OVERALL PERFORMANCE RATING

PERFORMANCE FACTORS

I.   **WHAT (Performance Objectives)**

II. **HOW (Core Values)**

OVERALL PERFORMANCE RATING (Sum of all Weighted Values)

Over-all Strong Areas

G.   MY GROWTH PLAN

Key Performance Areas	Development Needs	
What areas or aspects of the employee's performance requires further enhancement (e.g. Reporting Accuracy, Sales Productivity, etc).	To enhance performance, what specific competency areas (skills, knowledge, and attitude) need further development?	What arethe major learning a could range from self-directed special pro **[70-20-10 Principle: 7(**
ACHIEVEMENT OF SALES TARGET	Training on Cross Selling	Coaching, m

EMPLOYEE'S COMMENTS on his/her appraisal and rating:

I confirm that my immediate superior/department head personally discussed with me the results of this performance evaluation and appraisal and I agree with the rating in this form.

ARNIE C. SAYRE

Signature over printed name

RECOMMENDING APPROVAL:

Scan

Department Head / Manager

For HR Use only
Date Received:
Received by:
Calibrated by:

PLAN (MPP)
& File)

	Department	NETWORK OPS – BAYBAY
Rank & File	Evaluation Period	**MAR 21, 2024 TO AUG 21, 2024**

☐ YEAR-END   ☐ SPECIAL

e period.

of this form and submit the completed form to HR for processing.

	HOW RATING SCALE (CORE VALUES & LEADERSHIP DIMENSIONS)	
argets undaries	**ROLE MODEL**	**LIVES** the core values and leadership practices within and outside work. A CLEAR ADVOCATE of the core values and leadership practices.
ations.	**INFLUENCERS**	**EMBRACES** the core values / leadership practices and INFLUENCES others to follow his / her lead
ement of	**ALIGNED**	**CONSISTENTLY** behaves and acts in alignment with the core values and leadership practices
s to	**INCONSISTENT**	**OCASSIONALLY** exhibits the core values and leadership practices and requires frequent reminder to do so.
.	**CHALLENGED**	**DOES NOT often** display acts and behaviors aligned with the core values and leadership practices and is disruptive to others who wants to adhere to the core values/leadership practices.

Actual Result	% Weight	Rating	Weighted Rating
79% & below	**10%**	**2**	**0.2**
80% to 89%	**15%**	**2**	**0.3**
90% to 99%	**15%**	**4**	**0.6**

	% Weight	Rating	Weighted Rating
1-3 complaints	10%	4	0.4
4-6 error	15%	4	0.6
Minor findings but resolved	15%	3	0.45
Complete Marketing Collaterals and orderly installed	10%	4	0.4
80%lack 2 training	10%	4	0.4
	100%		3.35

an item.

% Weight	Rating	Weighted Rating	Summary of Demonstrated Strengths / Achievements	Summary of Identified Development Needs
20%	4	0.8	Highly organized and good at prioritizing what is important.	
20%	4	0.8	spearheaded sales and marketing initiatives for a newly launched products.	
20%	4	0.8	Confidence when making decisions for the team.	
20%	3	0.6	Always looks for ways to create extra value in the work that is done.	

20%	3	0.6	Valued clients and shows respect to others.	

100%		3.60	

RATING	WEIGHT	FINAL RATING	PERFORMANCE SUMMARY NOTES (Optional)
3.35	70%	2.35	branch is profitable in terms of NIBT. More REMCO's and AVP sales in the next coming months. More pension & teacher's loan solicitations
3.60	30%	1.08	
E		3.43	

Over-all Development Areas

Action Plan	Target Completion Date	Status	Remarks
activities required to address the development need. Activities l learning, e-learning, mentoring, coaching, attending training, ojects, exposure to different functions, etc. **0% Self-Learning, 20% Coaching/Mentoring, 10% Trainings]**	By when do you plan to complete this action item?		
entoring, training on best practices	done		

IMMEDIATE SUPERIOR'S COMMENTS:

	We confirm that I personally discussed this appraisal to the concerned staff
	ROSEMARIE PABATAO (BOS) / JOSE MALATBALAT (ROH)
	Signature over printed name
	Department Head Comments (No need to fill this in if the rater is the Department Head)
	HR Remarks

	CATEGORY	KPI	MONITORING TOOL
1	Financial	PHV Card Transaction Target Attainment/ AVP Revenue Targets	Digital Report
		Branch Profitability/Revenue based on Net Income Before Tax (NIBT)	Finance Report c/o MDE
		WU, Other Remco Targets,	USP/Branch Monitoring Sheet/Data Analytics-SOS
2	Customer	Customer Engagement Rating (Will cover both Internal & External Customers/ Bida ka sa PeraHub)	Customer complaint /Commendation Logsheet
3	Branch Operations Management/Internal Efficiency	Transaction Accuracy Rating	Branches Error List from CSC & Accounting COW Losses Report
		Regular Audit & Compliance Rating	Audit Findings Report- HO
		Branch Physical Quality Rating / Marketing Audit Compliance	Spot Audit Report/Bida ka sa PeraHub Audit
4	Learning & Growth	FLA Onboarding/Training, Bida Ka Training, AMLA& Others Programs & Trainings set by the Training Team(% of Completed Set of Learning Programs, as applicable)	Attendance Report

TARGET	PARAMETER	WEIGHT	FINAL WEIGHT
at least 3 PHV Sales per day	5- 110% and above 4- 100% to109% 3- 90% to 99% 2- 80% to 89% 1- 79% & below	10	50%
Finance Report c/o MDE		20	
refer to Target 2022		20	
Zero customer complaint or with commendation/recognition from internal or customers.	5- zero complaint & with commendation from external customer (CLIENTS) 4- zero complaint & with commendation from internal customer (BOS/ROH/CH) 3-zero complaint 2-1-3 complaints 1-4 or more complaints	20	20%
Zero incident	5 – Zero error 4 – 1-3 error 3 – 4-6 error 2 – 1 major error with financial impact 1 – 2 & up major error with financial impact	5	20%
Commended	5 – Zero findings on last audit 4 – With compliance findings only 3 – Minor findings but resolved 2 – Minor findings but not resolved 1 – With major findings/financial loss	10	
Compliant to SOP A - Complete/updated Marketing Merchandising B- Cleanliness & Orderliness	5 – Compliant to standard requirements/clean/complete marketing collaterals/merchandizing are neatly installed 4 – Complete Marketing Collaterals and orderly installed 3 – Complete Marketing Collaterals but not orderly installed 2 – Incomplete Marketing Collaterals 1 – non compliant on both branch cleanliness and merchandising	5	
100%	5 – 100% completed all trainings 4 – 90%lack 1 training 3 – 80%Lack 2 trainings 2 – 50% Lack 3 trainings 1 – No Training	10	10%

100%

	10%		**0**
	15%		**0**
	15%		**0**
	10%		**0**
	15%		**0**
	15%		**0**
	10%		**0**
	10%		**0**