Performance review

*[meeting title]*

### Date:

*[the calendar date on which the meeting takes place]*

1st of July, 2025

### Time:

*[start time of the meeting]*

10.30 AM

### Meeting duration:

*[indicates the scheduled length of the meeting]*

30 minutes

### Attendees:

*[a list of individuals present at the meeting]*

Mark O’Neil (reviewer), Misha Bilson (reviewee)

## Agenda

### Review of performance metrics *(5 mins):*

*[overview of key KPIs and recent performance data]*

*Who’s presenting: Mark O'Neil*

-Campaign reporting delivery rate: 98% on time.

-Dashboard error rate reduced by 45% over the quarter.

-Monthly analytics updates sent consistently by the 2nd business day.

### Strengths and achievements *(5 mins):*

*[highlights of what reviewee has done well]*

*Who’s presenting: Mark O'Neil*

-Developed a new reporting template that’s now standard across teams.

-Took initiative in automating 3 key analytics processes.

-Received positive feedback from the client team for data clarity.

### Areas for development *(5 mins):*

*[opportunities to improve performance or grow skills]*

*Who’s presenting: Mark O'Neil*

-Increase visibility into daily progress via brief end-of-week summaries.

-Build more fluency with Looker’s advanced segmentation features.

### Goals for the next period *(5 mins):*

*[specific goals and outcomes expected in the next cycle]*

*Who’s presenting: Mark O'Neil*

-Implement a weekly reporting alert system by August 1.

-Co-lead training on dashboard filters with junior team members.

-Shadow a client call each month to better understand business context.

### Support and resources *(5 mins):*

*[what support is needed to meet goals]*

*Who’s presenting: Mark O'Neil*

-Enroll in advanced Looker workshop (July 15).

-Provide template documentation for new alert system.

-Schedule check-ins biweekly for alignment.

### Feedback and concerns *(5 mins):*

*[open floor for reviewee to share feedback, concerns, or requests]*

*Who’s presenting: Misha Bilson*

-Appreciated clarity of goals this quarter.

-Suggested clearer timelines on cross-department requests.

-Requested early access to client strategy documents for context.

### Action items:

*[list of tasks, who’s responsible, and when they’re due]*

| Misha | Draft reporting alert system by July 22 |
| --- | --- |
| Mark | Provide documentation template by July 12 |
| Mark | Enroll Mischa in Looker workshop by July 8 |
| Misha | Start shadowing one client call per month – ongoing, start**:** July 10 |

### Additional notes:

*[any extra points or reminders]*

-Next performance check-in scheduled for September 30.

-Summary of review to be shared by Mark by July 6.