

# 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)

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## 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.