

Derek Marsh
Sales Director
Employer HR file

Date: 14 July 2026
Our Reference: OC/0040FA26
Document Type: Checklist

Objectives Checklist

1. PERFORMANCE REVIEW PREPARATION TASKS

- Confirm review period covers 12 months to 31 May 2025, reflecting seasonal cycles and the lost renewal.
- Schedule the performance review meeting for 12 June 2025.
- Review previous year's objectives and achievements with reference to company records.
- Identify new objectives aligned with company goals and employee development needs.
- Assess broad performance outcomes highlighting areas of concern and achievements.
- Collect and examine supporting documents including sales ledger, calendar invites, account notes and previous coaching emails.
- Observe management feedback focusing on administrative process gaps, pipeline reporting and delegation.
- Evaluate employee's input acknowledging challenges and suggestions for support.
- Review relevant company policies: Company Performance & Appraisal Note, Sales Commission Process, and Client Account Handover practice.
- Prepare a development plan addressing delegation skills and time management.
- Plan a documented improvement strategy with clear milestones and CRM usage checklist.
- Set a follow-up review date for 12 September 2025.
- Arrange to issue the final review documents as PDF by email with request for signature acknowledgment.

 CHECKLIST DETAILS

Employee
Derek Marsh

Role
Sales Director

Case type
Performance Review

Reference
HRA-0040FA26

 KEY DATES

Completed
14 July 2026

First review
12 June 2025

Owner
Nina Lopez (Owner-manager)

 REVIEW CONTROL

Review dates, standards and measurements should remain clear, measurable and recorded in writing.

Ensure Derek Marsh receives draft for review within 3 working days post-meeting.

Review Schedule

Review	Owner	Due Date	Evidence Required	Status
Initial review	Nina Lopez (Owner-manager)	12 June 2025	Review notes	Scheduled

Follow-up Action Plan

Action	Owner	Due Date	Evidence Required	Status
Annual Review Reminder is due on 12 June 2026.	Nina Lopez (Owner-manager)	12 June 2025	Completion note or supporting evidence	Open
Setting measurable objectives before the next review.	Nina Lopez (Owner-manager)	12 June 2025	Completion note or supporting evidence	Open
Schedule a follow-up review.	Nina Lopez (Owner-manager)	12 June 2025	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	Nina Lopez (Owner-manager)	12 June 2025	Completion note or supporting evidence	Open
File the final documents in the employee's personnel record.	Nina Lopez (Owner-manager)	12 June 2025	Completion note or supporting evidence	Open
Assign an owner for each follow-up action and diarise the next review date.	Nina Lopez (Owner-manager)	12 June 2025	Completion note or supporting evidence	Open

Continued

Objectives Checklist

2. ASSIGNED RESPONSIBILITIES

Nina Lopez: Owner-manager responsible for coordinating the review process and follow-up actions.

Derek Marsh: Sales Director expected to participate in the review, provide feedback and engage with development activities.

Nina Lopez: To develop and agree on a CRM checklist and training schedule with Derek.

Manager: To monitor and document improvements in pipeline reporting and administrative task delegation.

HR Team: To file completed review documents in the employee's personnel record and diarise next review.

Continued

Objectives Checklist

3. TASK PRIORITIES AND DUE DATES

Confirm review meeting and prepare documentation – Priority: High, Due: 12 June 2025.

Set and agree new objectives with SMART criteria – Priority: High, Due: 31 July 2025.

Develop CRM checklist and provide CRM training session – Priority: Medium, Due: 31 July 2025.

Complete delegation and time-management workshop – Priority: Medium, Due: 30 August 2025.

Conduct 3-month follow-up review on pipeline compliance – Priority: Medium, Due: 12 September 2025.

Issue final signed review documents to personnel file and employee – Priority: High, Due: within 3 working days of meeting.

4. EVIDENCE REQUIRED

Sales ledger documentation covering the performance year.

Calendar invites documenting client travel and meetings.

Shared client account notes for key accounts.

Records of previous informal coaching discussions, including email chains.

CRM checklist template to be developed.

Documentation of administrative support arrangements during peak periods.

Training attendance records for delegation workshop and CRM session.

Signed acknowledgement of final review document from Derek Marsh.

Continued

Objectives Checklist

5. STATUS AND COMPLETION NOTES

Preparation complete: Confirmed meeting date and distributed pre-meeting materials.

Meeting conducted: 12 June 2025; discussed achievements and concerns.

Achievements highlighted include account retention, new wholesale partnerships and in-store coaching success.

Concerns noted on administrative follow-through and pipeline visibility.

New SMART objectives set with agreement from Derek Marsh.

Development plan established covering delegation and pipeline reporting.

Next steps include coordination of CRM checklist and training by Nina Lopez.

Follow-up review scheduled for 12 September 2025 to monitor progress.

Document to be issued by PDF email with signature request within 3 working days.

Awaiting employee feedback on draft before final filing.