

Derek Marsh
Sales Director
Employer HR file

Date: 14 July 2026
Our Reference: PRR/0040FA26
Document Type: HR record

Performance Review Record

1. CASE SUMMARY

This Performance Review Record concerns Derek Marsh, Sales Director at HRHeaven QA Sample Employer, covering the 12-month period ending 31 May 2025. The review meeting took place on 12 June 2025 and focused on evaluating Derek’s achievements, areas of concern, and objectives for the forthcoming six months. The overall performance outcome identified some concerns primarily related to administrative follow-through and pipeline visibility, balanced against notable commercial successes and strong client engagement.

HR RECORD 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.

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Performance Review Record

2.

 BACKGROUND

Derek Marsh operates within a suburban high-street retail environment complemented by hybrid client travel and a small central office setup.

Formal objectives for the review period had been previously agreed, aligned with the Company Performance & Appraisal Note, referencing also the Sales Commission Process and Client Account Handover practice.

Derek acknowledged the loss of one key renewal during this period, attributing this in part to overlapping travel commitments and an unusually busy business cycle.

Informal management support included one coaching discussion held in December 2024 and occasional administrative assistance during peak trading times.

Review Schedule

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

Continued

Performance Review Record

3. INFORMATION CONSIDERED

Management observations highlighted gaps in administrative close-down processes, inconsistent updating of the sales pipeline, and limited evidence of delegation in ensuring follow-through on tasks.

Supporting documents reviewed encompassed the sales ledger, calendar invites, shared account notes, and a prior informal coaching email chain.

Derek expressed a request for clearer administrative support and recommended introducing a CRM template to aid consistency.

Achievements noted included consistent retention of the majority of accounts, successful negotiation of two new wholesale partnerships in 2024, and effective coaching during in-store events.

Development areas focused on improving delegation of administrative duties, establishing routine pipeline reporting, and allocating time for coaching sessions with team members.

Continued

Performance Review Record

4. DECISION

The review outcome identified some concerns with Derek's administrative follow-through and pipeline visibility but recognised strong commercial contributions overall.

An improvement plan will be implemented, including defined milestones and support mechanisms to address identified development areas.

Specific new SMART objectives have been set for delivery over the next six months to enhance pipeline reporting and delegation.

Training initiatives will be provided, encompassing a one-day delegation and time-management workshop, alongside CRM training and the introduction of an account checklist system.

A follow-up review meeting is scheduled for 12 September 2025 to assess progress against these objectives and compliance with pipeline reporting requirements.

Continued

Performance Review Record

5. REASONS

The combination of observed inconsistencies in administrative processes and Derek's own acknowledgment of challenges during a particularly busy period underline the need for targeted development.

The successful retention and growth of key accounts during a difficult cycle demonstrate Derek's capability and commitment, forming a basis for continued leadership and career development.

Introducing clearer procedural supports such as a CRM checklist and reinforcing delegation addresses the root causes of the performance concerns.

This approach aligns with the Company Performance & Appraisal Note, ensuring a supportive, development-focused process rather than an adversarial one.

Continued

Performance Review Record

6. FOLLOW-UP ACTIONS

Nina Lopez, as the owner-manager, is responsible for coordinating the implementation of the CRM checklist and arranging the agreed training sessions with Derek.

Derek is to deliver weekly pipeline reports by each Friday at 17:00, commencing immediately.

The CRM checklist for each key account is to be introduced by 31 July 2025, supporting improved client account handover and administration.

Derek will complete the delegation and time-management workshop by 30 August 2025.

A development plan focused on delegation skills will be enacted, supporting Derek's aspiration to maintain senior commercial responsibilities and clarify succession planning within the team.

The next performance review will be conducted on 12 September 2025 to monitor objectives and assess compliance with the agreed improvement plan.

Continued

Performance Review Record

7. AUDIT INFORMATION

Document prepared on 14 July 2026 in line with the Company Performance & Appraisal Note.

Review meeting held on 12 June 2025.

Derek Marsh acknowledged the content of this Performance Review Record and has been given the draft within three working days post-meeting for comments and signature acknowledgment prior to final issue.

The record will be issued as a PDF by email and retained confidentially in the employee's personnel file.

The employer is reminded to review and verify all factual content of this record before finalisation, and to keep under consideration the upcoming Annual Review Reminder scheduled for 12 June 2026.