

Progress Evaluation - CEO

Rate each area on a scale of 1-5:

- 1 = Needs significant improvement
- 2 = Below expectations
- 3 = Meets expectations
- 4 = Exceeds expectations
- 5 = Outstanding performance

| Evaluation Area | Description | Score (1-5) |
|--------------------------|---|-------------|
| 1. Strategic Leadership | Ability to develop and implement the company's vision, lead quarterly/annual planning sessions, oversee marketing initiatives, and establish/track KPIs. | |
| 2. Financial Management | Effectiveness in monitoring collections vs. production statistics, reviewing financial reports, managing budgets, and maintaining financial accountability. | |
| 3. Operational Oversight | Skill in providing executive guidance on operational strategies, reviewing departmental performance, and ensuring alignment with organizational mission. | |
| 4. Business Development | Success in planning conference participation, developing referral strategies, improving patient retention, and exploring new service opportunities. | |
| 5. Revenue Growth | Performance in monitoring collections and profit metrics over specific time periods. | |
| 6. Customer Satisfaction | Effectiveness in tracking and improving overall patient retention rates and satisfaction levels. | |

| | | |
|---------------------------|---|--|
| 7. Operational Efficiency | Ability to lead special projects and initiatives for business improvement while optimizing departmental performance. | |
| 8. Employee Productivity | Success in tracking team performance metrics and improving productivity levels across the organization. | |
| 9. Team Leadership | Effectiveness in managing team performance and providing executive guidance across departments. | |
| 10. Mission Alignment | Success in maintaining the company's mission to make healthcare tools accessible to everyone while ensuring sustainable growth. | |
| Total Score: | /50 | |
| | | |

Comments and Development Plan:

Evaluator: _____ Date: _____

Employee: _____ Date: _____

Score Interpretation

| Total Score | Performance Level | Description |
|-------------|-------------------|--|
| 45-50 | Outstanding | Exceptional performance that consistently exceeds all expectations. Role model for others. |

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|----------|----------------------|---|
| 40-44 | Exceeds Expectations | Strong performance that frequently surpasses requirements in key areas. |
| 30-39 | Meets Expectations | Solid performance that fulfills all essential job requirements. |
| 20-29 | Needs Improvement | Performance that meets some requirements but falls short in several areas. Development plan required. |
| 10-19 | Unsatisfactory | Performance consistently below expectations. Immediate corrective action needed. |
| Below 10 | Critical Concern | Significant performance issues requiring urgent intervention and comprehensive improvement plan. |