

Performance Evaluation for VP of Marketing and Operations

Surprise Regional Chamber of Commerce

Date:

	Exceeds (3)	Meets (2)	DNM (1)	Comments
How satisfied are you that the VP:				
VP Responsibilities				
Look for expansion opportunities, like new customers, markets, industry developments and new opportunities to increase sales.				
Be aware of the internal and external competition from local, state and national companies/associations who work in similar areas. Keep up to date with the overall association landscape				
Evaluate the overall state of the company and understand where it can improve and what it is doing well or can improve upon.				
Contribute to the sales by suggesting new revenue streams or to increase profitability of existing services.				
As requested take part in the CEO/board team meetings to report development activities.				
Marketing and sales	Exceeds (3)	Meets (2)	DNM (1)	Comments
Create and implement strategic sales and marketing plans that successfully achieve business objectives, including changes in membership offerings and pricing.				
Monitor competitors' products, including relevant sales and marketing data				
Use available data to accurately forecast sales and set appropriate performance goals				
Develop and maintain positive relationships with key clients, including negotiating and closing on major contracts				
Prepare monthly and quarterly sales reports and submit your findings and analysis to senior management				
Member Relations	Exceeds (3)	Meets (2)	DNM (1)	Comments
Build and improve relationships with customers and partners				
Educate and inform clients about the company's products, services and special offers				
Attend to client complaints and resolve issues promptly				
Conduct customer satisfaction surveys and recommend ways of improving client satisfaction				
Develop and maintain drip marketing management systems in CN and CC				

	Exceeds (3)	Meets (2)	DNM (1)	Comments
How satisfied are you that the VP:				
General Development and Major Donor Activities	Exceeds (3)	Meets (2)	DNM (1)	Comments
Maintaining current client relationships and identifying potential clients				
Helps the organization define performance measures for fund development and monitor bench marks. (AVG, LTV, LYBNTY, SYBNTY)				
Assist the CEO in helping the board fulfill their due diligence obligations to assure an effective development program				
Collaborate with the CEO to improve marketing materials and expand the company's marketing presence				
Inside Sales Functions	Exceeds (3)	Meets (2)	DNM (1)	Comments
Answer phones and assist members				
Upsell clients by recommending higher-end offerings				
Respond swiftly and courteously to customer complaints or inquiries				
Supervision of Telemarketer	Exceeds (3)	Meets (2)	DNM (1)	Comments
Train and supervise TM including script and messaging edits to ensure consistency of sales				
Make sure person meets appointment/sales quota				
Ensure proper records are maintained				
Digital Marketing	Exceeds (3)	Meets (2)	DNM (1)	Comments
Develop digital and traditional marketing campaigns across multiple platforms				
Monitoring and evaluating online media campaigns to keep them fresh and effective				
Staying current with emerging opportunities in the digital marketing world				
Monitoring all social media content				
Track customer engagement/KPI to optimize campaign content reach				

	Exceeds (3)	Meets (2)	DNM (1)	Comments
How satisfied are you that the VP:				
Program & Event Coordination	Exceeds (3)	Meets (2)	DNM (1)	Comments
Plan and coordinate event details including seating, food, registration, security and other logistics				
Contact, coordinate and confirm speakers, candidates and panel members				
Meet budget on all programs				
Process online reservations, invoicing, and update the system to reflect the new status for each event				
Accounts Receivables / Payroll	Exceeds (3)	Meets (2)	DNM (1)	
Review and send out monthly invoices (mail and email) as per schedule				
Verbally communicating with past due clients and customers to request and arrange payments				
Recording and tracking payments (credits, refunds, drops, list only, etc.)				
Monitor and follow-up on all recurring payments (randomly audit to ensure timely processing)				
Submit bi-weekly employee payroll payments on time				
Prepare and deliver bank deposits to bank (daily or weekly)				