

Rating Factor 1 = Does not Meet Expectations 2 = Needs Improvement 3= Meets Expectations 4 = Exceeds Expectations

CSM Scorecard

Employee Name
 Manager Name
 CFO Name
 Date of Review



Section 1: Performance (Change to match your firm)		Metrics/ KPIs		360 Degree Feedback			Employee Input	Management
Goals/ Objectives	(Insert Targets) Examples below	Actual Result (Manager Input)	Employee Assessment	Manager Assessment	CFO/ Owner Assessment	Action Plan/ Improvement Goal	Comments/ Feedback	
Reactive Responsiveness to Client requests and tasks	24 hours		1					
Proactive communication with client on project updates and statuses	Bi-weekly		1					
Responsiveness to internal team member requests and tasks via teams	6 hours		1					
Budget Allocation (billable hours)	75-80%		1					
Monthly Financials submitted and finalized and sent to Controller for review	10th of month		1					
Payroll is submitted on deadline each period for each client	0 Missed Payroll		1					
Quality of Work- Complete tasks/ projects with limited review or comments	0-3 Comments/ Review		1					
Client Feedback/ Experience	90%		1					
Time Tracking- All time is entered and categorized/ coded properly.	Daily		1					
Section 2: Behaviors		Reflection		360 Degree Feedback			Employee Input	Management
Values/ Competencies	Prior Period (Self- assessment)	Prior Period (Manager Assessment)	Employee Assessment	Manager Assessment	CFO/ Owner Assessment	Action Plan/ Improvement Goal	Comments/ Feedback	
Attention to detail and process (learns and implements new processes, takes notes)			1					
Organization- Files are updated and placed in One Drive, Time management (daily planning, uses tools to manage)			1					
Promptness- Client and internal meetings are attended on time			1					
Communication- Communication is clear and understood both verbal and written. It is positive, confident, and expresses active listening			1					
Dependability- Employee is counted on and is dependable to get assigned tasks completed on time			1					
Team Work- Employee expresses and executes within the pod to help others where needed and teach/ train where there are gaps			1					
Section 3: Expertise		Reflection		360 Degree Feedback			Employee Input	Management
Skills/ Development/ Knowledge	Prior Period (Self- assessment)	Prior Period (Manager Assessment)	Employee Assessment	Manager Assessment	CFO/ Owner Assessment	Action Plan/ Improvement Goal	Comments/ Feedback	
Skills:								
1. QBO/ QBD			1					
2. Workpaper organization tool (EX: Sureprep)			1					
3. Payroll			1					
4. Transaction Monitoring			1					
5. Sales Tax			1					
6. Asset management			1					
7. Reconciliations			1					
Knowledge:								
1. Understands the function of their clients' business			1					
2. Expertise in their clients' industries			1					
3. Understands techniques to optimize data management			1					
Development:			Yes/ No Dropdown					
1. Expresses desire to move up in role			Yes					
2. Interested in learning tax, tax compliance, tax strategy			No					
3. Prioitizes professional development			Yes					
4. Reads, Listens, or watches 1 professional development asset per month			No					
5. Trains/ teaches others on their role			Yes					

Total Scores: 25 0 0
 Percentage of Max Score 25.00% 0.00% 0.00%

Exceeds Expectations >86%
 Meets Expectations 71-85%
 Needs Improvement 61-70%
 Does not meet expectation <60%