Performance 365



Kerr Financial Uses Performance 365 for Employee Performance Evaluation

Kerr Financial uses Performance Management 365 to support employee performance evaluation through key performance indicators (KPIs) and structured appraisal cycles. The application helps organize performance reviews around defined measures and evaluation periods.

By using KPIs and the appraisal cycle, the organization can assess employee performance in a more structured way, supporting its performance management process.

KERR FINANCIAL
FROM OUR FAMILY TO YOURS

Customer: Kerr Financial
Website: www.kerrfinancial.ca
Customer size: 11-50 employees
Country: Canada
Industry: Financial Services
Services: Integrated investment management, HoldCo accounting / corporate tax, Financial planning

KPI-Based Performance Evaluation

The use of KPIs supports employee evaluations against defined performance measures.

Structured Appraisal Cycles

Appraisal cycles provide a structured approach to conducting employee performance reviews.

Organized Performance Management

Performance Management 365 supports the organization's employee evaluation process through KPIs and appraisal cycles.

Challenges

Managing employee performance requires a structured approach to evaluating performance against defined expectations. Kerr Financial uses Performance Management 365 to support this process through KPIs and appraisal cycles.

Why Performance Management 365 Was Selected

The application provides tools for KPI-based evaluations and appraisal cycles, aligning with Kerr Financial's employee performance management needs.

Key Features in Use

- **Key Performance Indicators (KPIs):** Used to evaluate employee performance.
- **Appraisal Cycle:** Used to structure employee performance evaluations.

Solution

Performance Management 365 supports Kerr Financial's performance evaluation process by bringing KPI-based assessments and appraisal cycles into its performance management workflow.

Client Says

Performance Management 365 supports our employee performance evaluation process through KPIs and structured appraisal cycles, helping us organize performance reviews around defined performance measures."

- Kerr Financial, Canada

Key Benefits to Kerr Financial

- KPI-based employee performance evaluation.
- Structured appraisal cycles.
- A more organized approach to performance reviews.
- Support for the organization's performance management process.

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SOC 2 COMPLIANT TYPE II

Information Security Management System ISO 27001: 2022 Certified

SPRING 2026 Momentum Leader

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