**Promotion Eligibility Checklist**

**Section 1: Employee Information**

|  |  |  |  |
| --- | --- | --- | --- |
| Employee Name | Sarah Johnson | Employee ID | EMP-0457 |
| Department | Marketing | Current Job Title | Marketing Executive |
| Proposed Job Title | Senior Marketing Executive | Date of Joining | 15-Feb-2020 |
| Evaluation Period | Jan–Dec 2024 | Supervisor Name | James Carter |

**Section 2: Basic Eligibility Criteria**

| **#** | **Criteria** | **Yes / No** | **Remarks** |
| --- | --- | --- | --- |
| 1 | Has completed the minimum required tenure in current position | ✅ Yes | 4 years completed |
| 2 | Has no active disciplinary action | ✅ Yes | Clean record |
| 3 | Has achieved required performance ratings | ✅ Yes | Exceeds expectations |
| 4 | Meets educational or certification requirements | ✅ Yes | MBA completed |
| 5 | Has received at least one positive appraisal in last cycle | ✅ Yes | Excellent rating 2024 |
| 6 | Demonstrates leadership potential | ✅ Yes | Leading new campaign team |
| 7 | Meets attendance and punctuality standards | ✅ Yes | 98% attendance |
| 8 | Shows initiative and innovation | ✅ Yes | Proposed 3 new marketing strategies |
| 9 | Exhibits teamwork and collaboration | ✅ Yes | Strong peer feedback |
| 10 | Is recommended by supervisor | ✅ Yes | Written recommendation received |

**Section 3: Performance Summary**

| **Criteria** | **Rating (1–5)** | **Weight (%)** |
| --- | --- | --- |
| Job Knowledge | 4 | 20 |
| Quality of Work | 5 | 20 |
| Initiative | 4 | 15 |
| Leadership | 5 | 15 |
| Communication | 4 | 10 |
| Teamwork | 5 | 10 |
| Dependability | 5 | 10 |
| **Total Weighted Score** |  | **100%** |

**Section 4: Manager’s Recommendation**

| **Field** | **Details** |
| --- | --- |
| Recommended Action | Promote to Senior Marketing Executive |
| Effective Date | 01-Feb-2025 |
| Reason for Recommendation | Consistently exceeds targets, demonstrates leadership, and has excellent peer feedback. |
| Manager’s Signature | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Date | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

**Section 5: HR Approval**

| **Field** | **Details** |
| --- | --- |
| HR Reviewed By | Emily Davis |
| HR Comments | Meets all eligibility requirements; approved for promotion. |
| HR Signature |  |
| Date |  |