

PORTFOLIO SAMPLE DOCUMENT

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STANDARD OPERATING PROCEDURE

KPI Framework & Performance Appraisal SOP

Company:	Apotek Qu Farma, Bangkalan, Indonesia
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1. Purpose

This SOP defines the KPI (Key Performance Indicator) framework and performance appraisal process at Apotek Qu Farma. It establishes measurable, role-specific targets and a structured review cycle — supported where relevant by routine psychological evaluations — so that performance management is objective, consistent, and tied to both probation confirmation and ongoing development decisions.

2. Scope

This SOP applies to all employees at Apotek Qu Farma from their first day of employment (probation review) through ongoing semi-annual appraisal cycles. It applies to HR & Operations Staff who administer the framework, hiring/pharmacy managers who set and rate KPIs for their teams, and the Owner/Director who reviews outcomes tied to compensation or role changes.

3. Definitions

- **KPI (Key Performance Indicator):** a measurable target tied to a role's core responsibilities, used to evaluate performance objectively over a defined period.
- **Weighting:** the relative importance assigned to each KPI category, expressed as a percentage of the total appraisal score.
- **Rating Scale:** the 1–5 scale used to score each KPI (see Section 6).
- **Probation Review:** the evaluation conducted during an employee's first 3 months, combining KPI tracking with periodic psychological evaluation, used to confirm or extend probation.
- **Calibration:** the process by which managers jointly review ratings across the team to ensure consistent standards before scores are finalized.

4. Roles & Responsibilities

Activity	HR Staff	Hiring / Pharmacy Manager	Owner / Director
Define role-specific KPIs and weightings	R	A	C
Track KPI data monthly	R/A	C	-
Conduct routine psychological evaluations	R/A	I	-
Rate performance at each appraisal cycle	C	R/A	I
Calibrate ratings across team	R	A	C
Approve outcomes tied to compensation/role change	R	A	A
Maintain appraisal records	R/A	C	-

R = Responsible (does the work) A = Accountable (approves/owns the outcome) C = Consulted I = Informed

5. KPI Categories by Role

KPIs are grouped into four categories, weighted differently depending on role, reflecting each position's core value contribution.

Role Category	Productivity / Output (Weight)	Quality / Accuracy (Weight)	Customer / Service (Weight)	Reliability / Conduct (Weight)
Pharmacy / Dispensing Staff	25%	35%	20%	20%
Cashier / Customer Service	20%	20%	40%	20%
Administrative / Back-office	30%	30%	15%	25%
Supervisory / Team Lead	25%	20%	25%	30%

Example indicators: prescriptions/transactions processed per shift (Productivity); dispensing/data-entry error rate (Quality); customer complaint or satisfaction feedback (Customer/Service); attendance, punctuality, and adherence to SOPs (Reliability/Conduct).

6. Rating Scale

Score	Descriptor	Definition
5	Outstanding	Consistently exceeds target; a model for the role.
4	Exceeds Expectations	Regularly surpasses target on most KPIs.
3	Meets Expectations	Reliably achieves target; solid, consistent performance.
2	Needs Improvement	Below target on one or more KPIs; improvement plan required.
1	Unsatisfactory	Consistently below target; formal performance management required.

7. Appraisal Cycle

Stage	Timing	Key Activities	Responsible
Goal Setting	Within first week of employment / start of cycle	HR and manager agree role KPIs and weightings with the employee.	HR / Manager
Probation Monitoring	Monthly during months 1–3	Manager tracks KPI data; HR conducts a brief psychological evaluation check-in each month to support the probation decision.	HR / Manager
Probation Review	End of month 3	Combined KPI and evaluation review; manager and HR recommend confirmation, extension, or non-confirmation to the Owner/Director.	HR / Manager / Owner
Ongoing Monitoring	Monthly, post-confirmation	Manager records KPI data in the appraisal tracker; deviations are flagged for early discussion rather than held until the formal review.	Manager
Semi-Annual Appraisal	Every 6 months	Formal scoring against all weighted KPIs, supported by a routine psychological evaluation; manager and employee discuss results together.	HR / Manager
Calibration	Before scores are finalized	Managers review ratings jointly with HR to ensure consistent standards across the team.	HR / Managers
Development Planning	Following each semi-annual appraisal	Manager and employee agree a development plan addressing any KPI below target.	Manager / Employee

8. Link to Psychological Assessment

Routine psychological evaluations (behavioral and cognitive check-ins, distinct from the pre-hire DISC/Kraepelin/IQ battery in AQF-HR-SOP-001) are incorporated at probation review and each semi-annual appraisal. These evaluations help distinguish performance issues rooted in role fit or work style from those rooted in effort or conduct, and inform whether a development plan, role adjustment, or further formal action is appropriate.

9. Confidentiality & Data Handling

- KPI data and appraisal scores are accessible only to HR & Operations Staff, the employee's direct manager, and the Owner/Director.
- Appraisal records are maintained in the KPI & Performance Appraisal tracker and retained for the duration of employment plus 12 months.
- Psychological evaluation notes taken during appraisal are stored separately from general KPI data and are used solely for performance and development purposes.

10. Continuous Improvement

HR reviews KPI targets and category weightings annually — or sooner if operational priorities shift — comparing them against actual business outcomes (sales, compliance, customer feedback) and recommends adjustments to the Owner/Director. This review also validates that pre-hire psychological assessment results (per AQF-HR-SOP-001) remain predictive of on-the-job performance.

11. Related Documents

- AQF-HR-SOP-001 — Psychological Assessment Integration SOP — pre-hire assessment whose predictiveness this framework validates.
- AQF-HR-SOP-002 — Recruitment & Selection SOP — governs hiring through onboarding, prior to this framework taking effect.
- AQF-HR-TP-001 — Structured Digital Talent Pool Tracker — source of each hire's pre-hire assessment scores for comparison against appraisal outcomes.

12. Revision History

Version	Date	Author	Description of Change
1.0	February 2026	Alfi Syahr Nur Widenky (HR & Operations Staff)	Initial release — formalized KPI framework and performance appraisal cycle.