

1. Describe the performance issue.

Each salesperson is assigned a minimum 5-client roster and is expected to maintain a minimum of 5 clients. If a client does not renew their contract, the salesperson is expected to replace this with a new client, or at the very least be in the process of obtaining a replacement.

We noticed in the last quarter that you had lost 2 clients, but we have not seen any evidence that you have been actively looking for replacement clients.

2. Lay out expectations.

We would like for you to get back to having a minimum 5-client roster.

3. Set up timelines.

We would like for you to be back to a minimum 5-client roster by the end of this quarter (in 12 weeks.) That means signing on at least 2 additional clients within 12 weeks.

4. Create an action plan that includes goals and objectives.

We would like for you to begin the process of researching and vetting possible new clients and/or get back in touch with past clients to see if they need our services again. This should be done immediately. We will have a weekly meeting that will review what you've done in this regard, including reviewing correspondence with potential and previous clients.

Seeing as you need to sign on at least 2 new clients within the next 12 weeks, we would expect at least one to be signed on in within 6 weeks from today and another within 6 weeks after that.

5. Decide on a method of evaluation.

In addition to weekly meetings to review your progress, we will have a larger review halfway through this quarter to see if you have signed on at least 1 client. If you have, we will allot you the remaining 6 weeks of the quarter to sign on a 2nd, bringing you back to a minimum 5-client roster. If you have not signed on at least 1 client by that half-way point, we will need to discuss next steps, which may include re-assignment or termination.