

## 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.