

Performance Improvement Plan

At [The Company] we value our employees and strive to provide the guidance necessary so they can perform at their best. As an employee with [The Company], your management team has outlined performance expectations for your role. It has come to our attention that you are not meeting expectations and therefore are being placed on a Performance Improvement Plan. This Plan was developed to support your success by outlining the activities and sales results expected of your role with [The Company]. We'll be checking in and discussing your performance regularly, but will meet again to review your progress against the requirements of this plan in 2 weeks, at the end of this month, and at the end of next month.

Weekly Activity Requirements

- Minimum of XX outbound calls per week.
- Minimum of XX demos scheduled per week.
- Minimum of XX term sheets acquired per week

Monthly Requirements

- Meet minimum activity requirements.
- Meet at least 75% of the targeted revenue total for this month and overall 85% for the next two months combined.
- Log all notes, follow-ups, and requisition opportunity stages appropriately in Salesforce

There are a few key areas for improvement that I believe are driving your recent performance.

- *Become smarter about who & when you are calling customers. Your activity is very good, however, you are last (by far) on 2+ minute conversations. This leads me to believe that you can do more to catch your customers at the right time.*
- *Focus on the pitch & follow-up conversation. You have the lowest close % of demos on the sales team, there is a big opportunity to increase your numbers by converting more demos to close.*

Plan for Improvement

- Complete all Weekly Activity Requirements during this and next month
- Each week, submit 1-3 demos or pitch calls that highlight where you think a call could have gone better and/or where you think you've improved.
- Ping [Team member] before all demos & share [Team member] on every pitch
- Set goal for avg 2 demos booked per week
- Daily self-reflection through manager updates and weekly 1:1 coaching sessions

As your manager, I am here to support and coach you through this plan. Please let me know how I can assist you to ensure you have all the tools you need in order to be successful. We will continue to have one on one meetings weekly so I can provide you with the guidance and support you need during this time and during your tenure here. If the performance requirements are met by the dates listed above, you will become an employee in good standing. After successful completion of your Performance Improvement Plan, it is expected that you continue to meet and/or exceed the minimum monthly expectations outlined above. Failure to complete these minimum requirements may result in termination. Please let me know if you have any questions about this Performance Improvement Plan.

Signed: _____

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