Performance agreement template

A performance agreement can be a useful tool for setting targets, increasing accountability, and ensuring that you and your sales team are on the same page. A good performance agreement establishes fair expectations and goals, allows an employee to express their needs, and also provides an opportunity to schedule accountability meetings where you can evaluate progress.

Here’s a template you can use when designing your own performance agreements:

| **Performance agreement** |
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| Employee name: \_\_\_\_\_\_\_\_\_\_\_\_  Employee job title: \_\_\_\_\_\_\_\_\_\_\_  Period of agreement: 1/1/2021 to 1/1/2022  Planned dates for review: every 3 months   | **Employee expected metrics** | **Employee metrics at review 1/2/3** | | --- | --- | | For example: *Make 100 calls a day*  For example: *Set 2 meetings a week*  For example: *Close 3 deals a month*  For example: *Win/close rate of 0.3% over 6 months* | | **Metrics** | **Review 1** | **Review 2** | **Review 3** | | --- | --- | --- | --- | | **Average calls/day** | 86 | 94 | 112 | | **Average meetings/week** | 0.7 | 1.5 | 3 | | **Deals closed/month** | 0.4 | 2 | 4 | | **Win/close %** | 0.21% | 0.28% | 0.4% | |  | **Employee development plan** | | --- | | * For example: *Regular catch-ups to discuss metrics and concerns* * For example: *Additional time dedicated weekly to reviewing sales content* * For example: *Extra coaching time allocated twice monthly to assist with closing specific skill gap* * For example: *Monthly sales skills webinar attendance permitted* |   Date: 1/1/2021  Manager’s signature: \_\_\_\_\_\_\_\_\_\_\_\_  Employee’s signature: \_\_\_\_\_\_\_\_\_\_\_\_ |