

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

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: _____
