

Performance Achievement Plan

Team Member Name: James Riley	Leader Name: Maria Cortez	Date: 7/28/22
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PERFORMANCE TARGET	CURRENT PERFORMANCE
<ul style="list-style-type: none"> What is the expected key performance indicator (KPI)? What does success look like? 	<ul style="list-style-type: none"> What is the current level of performance? How long has this been occurring?
Generate 2 sales appointments per day, Monday - Friday.	Currently generating an average of 6 sales appointments per week over the last three months.

WHAT WILL BE ACHIEVED BY WHEN?	HOW WILL IT BE ACHIEVED?
<ul style="list-style-type: none"> Make it Specific, Measurable, Attainable, Relevant, and Time-Bound. 	Daily Supporting Activities: Engage in 12 prospect conversations per day.
James will generate an average of 2 sales appointments per day, or 10 sales appointments per week, by 8/28/2022.	Obstacles to Success: Time management.
	Plan for Overcoming Obstacles: Block 9-12pm, 1-3pm for prospect conversation
	Weekly Progress & Support Check-ins: Maria and James will meet weekly for 30 minutes on Mon and Wed at 8am.

WHAT WILL HAPPEN WHEN PERFORMANCE IS ACHIEVED?	WHAT WILL HAPPEN IF PERFORMANCE IS NOT ACHIEVED?
<ul style="list-style-type: none"> Will there be continued support? Follow-up? 	<ul style="list-style-type: none"> What will the outcome be?
James will continue to block his schedule for prospect conversations from 9-12 and 1-3pm daily, M-F with a goal of 12 prospect conversations. Maria and James will continue to meet on Mondays and Wednesdays at 8am until 9/28/22. If James is continuing to achieve performance, after 9/28/22, Maria and James will meet on Mondays at 8am.	Maria will assist James in obtaining a new job as James actively assists Maria with his exiting transition.

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