|  |  |  |
| --- | --- | --- |
| **Activity Expectations** | | |
| Prospecting Calls/Activity: Personal & client referrals, Previous association contacts & referrals, Advisor referrals, Call in follow up, Cold calls – phone, Cold calls – walk in, Renewal date calls, Renewal date follow up calls, Direct mail follow up, Prospect follow up, Other calls | **100** | **Per week** |
| Client Care Meetings with Existing Clients | **1** | **Per week** |
| First Meetings with Prospects (average) | **5** | **Per week** |
| Data Gathering Meetings (average) | **2** | **Per week** |
| Closing Meetings (average) | **1** | **Per week** |
| Partner Referral Meetings | **2** | **Per week** |
| Networking Activity | **3** | **Per month** |
| Special activity such as a speaking engagement, blog post, participation in trade show | **1** | **Per quarter** |

I agree:

My personal quarterly closed business expectations, activity expectations and president’s club

opportunity has been communicated to me. Expectations for 1st quarter are $55,000/ 55 WSE’s.

I will complete all required training, including sales meetings, coaching sessions, and updates

to Salesforce. I will use my best efforts in building the business case, including

completing all prospect underwriting documents and pricing model and summary in full.

I understand that my failure to meet expectations for one quarter may result in the

Implementation of a Performance Improvement Plan (PIP) or possible termination of my

employment. Failure to meet expectations for two consecutive quarters will result in

the implementation of a Performance Improvement Plan (PIP) and/or termination of my

employment.

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Director of Business Development:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_