

Annual Employee Expectations Worksheet

Year: 2020

Employee Name: John Doe, Salesperson

Manager: Jane Smith, Sales Manager

1. What does success in the position look like to *Jane (Sales Manager)*?
 - You achieve 100% of your 2020 sales goals in all revenue categories
 - Your notes from all of your sales meetings with prospects and customers are entered into our CRM System and are up-to-date
 - You develop formal and written proposals for 100% of the quotes provided to prospects and customers
 - We receive positive feedback from your teammates on your communication and interactions with them
 - We receive positive feedback from your customers on your communication and interactions with them
 - You attend four networking events each month
 - You generate eight prospect leads per month on your own via networking and cold calling
 - You complete a consultative sales class/workshop within the next 12 months

2. What are *Jane's (Sales Manager)* expectations of *John (Salesperson)*?
 - I see you working on revenue generation activities, excluding meetings, 30 hours per week
 - I review CRM and your activities are logged and in a timely manner
 - I receive a carbon copy of all proposals sent to prospects and customers
 - I see you interacting and communicating with colleagues and customers in a positive manner so to build strong relationships
 - I see you coming to me with ideas for marketing (direct mail, trade show strategies, various marketing collateral)
 - I see you attending four or more networking events each month to generate your own leads
 - I see you making 40+ outbound calls a day working prospects and clients to generate revenue
 - I see you asking for leads from clients
 - I see you working on a consultative sales development program



3. *John's (Salesperson)* strengths in this position are:

- Knowledge of the product line
- Ability to communicate and connect with all levels inside an organization
- You project a good level of energy and passion to prospects and clients
- People and relationship building skills
- Integrity and professionalism with your clients and prospects
- You conceptually want to be successful

4. *John's (Salesperson)* development/growth area in this position are:

- Planning your work and working your plan (assigning a time and place ahead of time and sticking to it)
- Impatience, which limits your ability to focus on digging deeper into detail for writing proposals, and thinking strategically
- Collaboration with Sales Manager
- Taking critique and improvement suggestions – concept to application needs work

Employee Name: John Doe

John Doe

Signed (Employee)

Manager Name: Jane Smith

Jane Smith

Signed (Reviewing Manager)

Date Discussed: January 15, 2020

