

**TO:**

**FROM:**

**DATE:**

**RE:           Performance Improvement Plan**  
**Timeframe: 90 days**

**Background/Concern(s)**

In a recent review of all BDM's it has come to our attention that areas of your performance are below acceptable levels. Specifically you do not meet the requirements of PHASE FORWARD job duties with regard to face to face meetings with customers/prospects and partners. Also you need to improve your involvement with area sales revenue which is outlined below in the objectives. Furthermore attendance at all district, area, and regional conference calls must improve.

It is imperative that you maintain an immediate and sustainable improvement in the areas of your BDM job duties noted below. PHASE FORWARD operates in a competitive environment and requires that you maintain an acceptable level of performance in all areas of your job duties.

**Objectives for the Performance Improvement Period**

During this Performance Improvement period, my expectations are as follows:

- A minimum of 5 face to face sales calls weekly to decision-makers.
- 100% compliance with all weekly activity reports and monthly reports
- Maintain a dashboard with account/partner involvement of 10% of the assigned area's quota.
- Attendance/participation on all weekly area, region, and assigned district conference calls
- Generate 2 incremental leads or 500K in incremental revenue/mo.

The behavior and activities required to meet these objectives must be immediate and sustained.

**Support/Review by Management**

I will meet with you twice a week (Monday and Thursday) in between 5:00-5:30 PM to review the current week's activities and to plan the next week

**Consequences**

**Should you fail to meet or sustain the requirements of this plan, or at any time in the future, you may be subject to further disciplinary action, up to and including termination.**

I have every confidence in your ability to meet this performance plan. Please be assured that I am here to provide you whatever guidance you need, channel support, account reviews and management involvement necessary. I look forward to your successful completion of this Performance Improvement Plan and ask that if you have any questions as we move forward, that you let me know.

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Date:

*My signature indicates that this Performance Improvement Plan document has been received, read, and discussed. My signature does not indicate agreement.*

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Date:

cc: Corporate HR  
SVP Sales