

End Of Month One On One

Employee's Details

Name Sophie Tighe

Years / months employed in this position 6 Months

Date of Review 7th June 2016

Reviewer (name & position)

Ramsay Pontin / Team Leader

EOM One On One

Client Manager Metrics - Key Monthly Outcomes

Metric	Month March	Month April	Month May	3 Month Average
Retention %	93.88%	96.83%	87.65%	92.78%
Active %	91.84%	90.48%	91.36%	91.22%
Number of Clients	49	63	81	64.3
Total Revenue Recieved	\$18534	\$19987	\$26388	\$21636.33
Total Unpaid Revenue	\$0	\$0	\$1048	
Total Credits/ Refunds	\$516/\$158	\$2115/\$79	\$3137/\$257	
Achievable Revenue	\$19208	\$22181	\$30830	

Notes

May was a difficult month for you. We saw a significant decrease in your retention numbers despite an influx of re-assign clients. This skewed your actual reportable figures for the month.

I feel that you struggled in May on a number of levels. The preasure you place on yourself is considerable and, in my opinion, is fairly debilitating.

You have a lot of ability and can build rapport quick with clients.

Having listened to a number of your phone calls in May I feel as if a more streamline approach to your phone contact would benefit you as a CM and see an improvement in your figures.

General Performance Comments

You may feel as if May beat you. We've all had months that make us question our ability; you have very little to worry about.

A combination of small improvements will see you consistently achieve your KPIs over the coming months.

As mentioned previously in this report, I feel as if the time you spend on the phone to each client is too high. Remember, we have to speak to a client, understand what they want and apply changes to the account.

I would suggest that you do preparation work prior to each call. On listening to a number of your calls it almost appears as if you're probing the client for suggestions rather than acting as their trusted advisor.

There are a number of instances during my time here where a high talk time doesn't translate to low KPIs.

Based on April and May statistics and following company procedure I should recommend you be placed on a Performance Improvement Plan. However, I feel if we work closely together throughout June we will see significant improvements in your approach to work and figures.

Action Plan - Goals For Next Review Period

Goal	Action Required	Date for Completion
Hit Both retention and active KPIs ✓	Improve Retention > 92% Improve Active > 92.50%	30th June 2016
Increase revenue over 30k ✓	Raise Revenue \$3,700	30th June 2016
Reduce Credit ✓	Reduce credits to less than <\$500 ✓	

Reviewer Signature

Date 07/06/16

CM Signature

Date 07/06/16