

ABC Company – VP, Sales Accountabilities

Accountability	Priority	Percent Time	Success Factors
Talent Management <ul style="list-style-type: none"> • Coach/Develop/Mentor • Build team and bench • Conduct regular one-on-ones • Development and succession plans for direct reports • Conduct quarterly performance reviews • Ride-alongs with direct reports • Personal development 	1	30%	<ul style="list-style-type: none"> • Demonstrated positive team interactions • Team member goals met • Team members demonstrate core values • Zero avoidable turnover of "A" players • Demonstrated team member growth • Quarterly reviews conducted and documented timely • Successful new hires; become "A" players • Personal development plan achieved
Sales Management <ul style="list-style-type: none"> • Develop and implement (teach) sales process • Problem solve sales issues • Create and develop sales channels • Strategic sales planning • Support sales team (remove obstacles, provide resources) • Develop prospect plans and strategies 	2	25%	<ul style="list-style-type: none"> • Develop sales strategy plan • Increase consulting to 401k sales ratio • Achieve sales goals • Incentive plans aligned with strategic sales plan
Marketing Management <ul style="list-style-type: none"> • Manage messages; strategies • COI management • Nurture leads; getting leads sales ready • Identify new partners • Support marketing team (remove obstacles, provide resources) 	3	20%	<ul style="list-style-type: none"> • Develop marketing plans • Lead targets achieved • COI lead targets achieved • Demonstrated client and internal message awareness
Customer Retention Management <ul style="list-style-type: none"> • Support CRM team (remove obstacles, provide resources) • Select client ownership • Develop retention plans and strategies • Oversee processes • Vendor/Partner Program management 	4	15%	<ul style="list-style-type: none"> • Increased clients' view of FOF as "partners" • Client retention plans in place • Measured success in Partner Program
Executive and General Administrative Activities <ul style="list-style-type: none"> • Budgeting • Business strategic planning • Work with peers and departments • Coordinate group activity • Executive/management team member • Executive team rock ownership • Work with CRM system (Net Suite) • Coordinate activity and KPI reports 	5	10%	<ul style="list-style-type: none"> • Positive team member feedback • Positive management feedback • Expenses within budget • Reports meaningful, timely, and accurate



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Accomplishments

What have you done last quarter?

What will you accomplish next quarter?

What have you done to invest in your own personal development?

How have you demonstrated our core values?

Date:

Talent Management

Sales Management

Marketing Management

Customer Retention Mgmt.

Exec. & Gen. Admin. Duties