



# Outbound Excellence's

## Account Transition Policy

Effective 11/14/10

### **#1. Eligibility for transition of accounts from termed Sales Associates will be as follows:**

- a) Must have averaged a minimum of 3:15 of Customer Contact Time the previous month
- b) Must have exceeded 90% of the previous quarter's sales quota (rolling 3 month average)
- c) Must have exceeded 90% of the previous quarter's Average Line Items quota (rolling 3 month average)
- d) Must have exceeded 90% of the previous quarter's Active Buying Customers quota (rolling 3 month average)
- e) Must **not** have exceeded Minimum Monthly Returns Average (using a rolling 3 month average).

### **#2. A report of the Sales Associates that meet these eligibility requirements will be published and distributed to all Sales Associates prior to the distribution of any accounts from a termed Sales Associate.**

The report will rank the AE's based on their performance to the requirements listed above.

### **#3. The top 24 accounts will be segmented into 3 groups of 8 and offered to the top 3 ranked SA's**

**Mode of distribution = Rotate top 24 accounts A=1,2,3...B=4,5,6...C=7,8,9... A=10, 11, 12 etc.**

The second group of 24 accounts will be distributed in the same manner.

The remaining accounts will be distributed, based on performance, amongst AE's with less than 1-year tenure.

### **#4. Once an AE accepts a block of accounts, 80% of the 3 month average (revenue) will be added to the new AE's forecast beginning the following month.**

(Based on the Current Sales Forecast).

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**#5. An AE will only be eligible to acquire new accounts from termed AE's once per quarter**  
(based on a 90 day running calendar).

**#6. The number and names of eligible AE's will change on a monthly basis so the data used for the distribution of termed AE's accounts will ALWAYS BE BASED ON THE PREVIOUS MONTHS DATA.**

**#7. To eliminate "buddy system" transfers Sales Managers will be responsible for managing the back-up support of team members to ensure that calls are routed to the members of their team with the highest ranking on the eligibility report.**

**Any AE violating the above mentioned policy will be subject to a written warning and will not be eligible for the transition of accounts for one year from the date of the violation.**

**#8. Once per quarter, a maximum of 5 accounts may be distributed to an AE with previous sales AND industry experience.**

However, in order to be eligible the AE Associate being recruited must meet the following requirements:

- 1) Must have documented experience working in the same industry within the previous 6 months**
- 2) Performance to goal for the previous 3 months must exceed 90%**
- 3) Must have documented support of 3:15 of customer contact time**
- 4) Must be approved by the VP**

All requirements must be documented and made available to all AE's prior to distribution.