



SALES REPRESENTATIVE

# Role, Expectations, Probation Terms & Compensation

To be read, understood and signed by both parties before the start date.

This document sets out exactly what the role is, the standard expected at each stage, how performance is measured, the terms of probation, and how you are paid. Nothing here is hidden and nothing here is negotiated after signing. If anything is unclear, ask before you sign, not after.

## 1. The Role

You are a Sales Representative working a shared pool of warm inbound leads (webinar, opt-in and enquiry). Your job is to follow up through whatever channel converts (phone, email, text or social), book qualified 15-minute discovery calls, run full one-hour sales calls, and close.

You will not be handed the freshest leads on day one. You earn access to better leads by proving you can turn them into shown discovery calls. This protects the lead pool and rewards the people doing the work.

### Lead Tiers

Leads are grouped into four tiers by recency:

- Tier 1: 0 to 10 days since enquiry (freshest, highest intent)
- Tier 2: 11 to 30 days
- Tier 3: 31 to 90 days
- Tier 4: 90+ days (where everyone starts)

### The Tier Ladder

Stage	Requirement to unlock	Access
Start (Day 1)	Complete the onboarding course	Tier 4 only

Stage	Requirement to unlock	Access
Unlock Tier 3	2 shown discoveries from Tier 4	Tier 4 + 3
Unlock Tier 2	3 further shown discoveries (from Tier 3)	Tier 4 + 3 + 2
Unlock Tier 1	3 further shown discoveries (from Tier 2)	Full lead pool

Total shown discoveries to reach Tier 1: 8. Once a tier is unlocked it stays unlocked. The first new rep to reach Tier 1 earns a £250 Launch Bonus, announced to the whole team.

## How the pool works

- Within the tiers you have unlocked, leads are pulled at random so every rep gets equal access to fresh enquiries.
- Automation handles the first 3 to 4 days of qualification by text and email. You step in after that.
- Success is judged on a blend of activity, pipeline created, conversion and closed deals, all tracked automatically (see Section 6).

## 2. Probation Period

Probation runs for 12 weeks. It is built to ramp you from learning to full performance. Week 12 should look meaningfully stronger than Week 3.

- **Weeks 1 to 2 (Onboarding & ramp):** Complete the onboarding course (tech, product, scripts, process). Practise on Tier 4 only. You do not yet run your own discovery calls; bookings in this phase pass to the existing discovery team.
- **Weeks 3 to 5 (Early performance):** You begin running your own discoveries. Activity, pipeline and tier-graduation milestones now apply.
- **Weeks 6 to 9 (Building):** Standards step up. Conversion and close performance start to count.
- **Weeks 10 to 12 (Full performance):** Final standards apply, ending in your end-of-probation review.

**At the end of the 12 weeks your performance is reviewed against Sections 3 and 5. If the standards have not been met, probation is failed and employment ends.**

## 3. Performance Standards

Standards ramp across probation. Each phase carries its own minimum.

Metric	Wks 1 to 2	Wks 3 to 5	Wks 6 to 9	Wks 10 to 12
Meaningful conversations / day	15 (practice)	20	25	30
Discoveries booked / week	n/a	5	8	10 to 12
Show-up rate	-	-	55%+	70%+
Closes (per phase)	-	-	1+	toward 8 total

**End-of-probation target:** a minimum of 8 closed deals by the end of Week 12. Ongoing standards beyond probation are set in your wrap-up review and reflect what top performers in the role achieve.

### What counts as a "meaningful conversation"

A genuine two-way exchange: at least three messages back and forth, or a live phone conversation of 90 seconds or more (voicemail does not count). Every meaningful conversation must be logged with a disposition. Inflating, double-counting or flagging interactions that do not qualify is a fail condition (see Section 5).

### Lead utilisation

Every lead you pull must receive at least five contact attempts across multiple channels before it is treated as worked. Pulling leads and leaving them sit fails the activity standard.

## 4. Three-Strike Accountability

This exists to keep accountability objective. Strikes are raised by the performance dashboard, not by opinion. Three strikes during probation means termination, regardless of anything else.

Strike	What triggers it
<b>Activity strike</b>	Any single week where your daily average is more than a third below the phase standard (e.g. in Weeks 10 to 12 the standard is 30/day, so below 20/day average is a strike).
<b>Pipeline strike</b>	Two weeks running below the phase minimum for discoveries booked (5/wk in Wks 3 to 5, 8/wk in Wks 6 to 9, 10/wk in Wks 10 to 12).
<b>Coaching strike</b>	Failing a documented action item from a weekly 1:1. Action items are written down with a deadline, acknowledged by you in writing, and visible in your Slack channel.

Strikes are issued in writing in your weekly 1:1. You will always know when you have a strike and how many you hold.

## 5. Non-Negotiable Fail Conditions

Separate from the three-strike policy, any one of the following fails probation on its own:

1. Fewer than 8 closed deals by the end of Week 12.
2. Discovery show-up rate below 55% in Weeks 10 to 12 (signals low-quality bookings).
3. Close rate below 15% on sales calls run in Weeks 9 to 12 (signals inability to close).
4. Failing to unlock Tier 1 by the end of Week 7 (signals you cannot convert at the rate the role needs).
5. Falsifying activity, manipulating lead pulls, inflating conversation flags, or any conduct that undermines the integrity of the performance system.

**These are absolute. They are measured, not interpreted.**

## 6. How Performance Is Tracked

Tracking runs across three layers that cross-check each other: automated dashboard data, Slack self-flagging, and AI call analysis.

### Layer 1: Automated dashboard

- Every call, text, email and social message is logged automatically via integrations.
- Your live dashboard shows dials, messages, response rates, bookings, show-up rate and closes. You can see exactly where you stand at any time.
- A team dashboard shows all reps side by side, so you can see where you sit against the rest.

### Layer 2: Slack self-flagging

- Each rep has a personal Slack channel where activity events appear.
- When you have a meaningful conversation, flag it with the Slack button. That is how it is counted.
- Our AI checks each flag against the definition and gives you immediate feedback. Your end-of-day report is generated automatically; you do not write it by hand.

### Layer 3: AI call analysis

- Every discovery and sales call is transcribed and scored by section (rapport, qualification, objection handling, close) so you get specific coaching after every call.
- A weekly summary shows what is working, what needs work, and how you compare to top performers.
- AI feedback is for development. Your probation result is decided on the objective metrics in Section 3, never on a subjective score.

### Meetings

- **Monday kickoff:** 15-minute team start to the week. Attendance required.
- **Friday group training:** team training, performance review and Top Performer of the Week.
- **Weekly 1:1 (15 to 20 min):** review metrics, set coaching items, and acknowledge any strikes in writing.

## 7. Compensation

Your pay has three parts: base salary (set by your recruiting company), commission on closed deals, and performance bonuses. Commission and bonuses apply from day one; they are not withheld during probation.

### 7.1 Commission

Commission is paid on cash collected from customers, not on contract value. When a customer pays, you earn on that payment; on a payment plan, you earn each time they pay. Commission is worked out per deal based on its position in the calendar month. Rates are not retroactive, so each deal earns the rate of its own position.

Deal number that month	Rate (on cash collected)	On an £8,000 deal
Deals 1 to 2	0%	£0
Deal 3	2%	£160

Deal number that month	Rate (on cash collected)	On an £8,000 deal
Deal 4	3%	£240
Deal 5	4%	£320
Deals 6 to 9	5%	£400 each
Deal 10+	5% + £750 bonus on deal 10	£1,150 on deal 10

### Worked example

Close 5 deals in a month, all £8,000 paid in full: Deal 3 £160 + Deal 4 £240 + Deal 5 £320 = £720 commission.

Close 10 deals in a month: £0 + £0 + £160 + £240 + £320 + (4 x £400) + (£400 + £750 bonus) = £3,470 commission.

*Payment-plan note: on a plan, you earn on each payment as it lands, at the deal's tier when it closed. A deal-3 closed in one month keeps paying you 2% on collections received in later months.*

## 7.2 Performance bonuses

Bonus	Amount	Trigger
Launch bonus	£250	First new rep to unlock Tier 1. One-time.
Show-up bonus	£400	Hold a 70%+ discovery show-up rate for a full calendar month (while hitting minimum bookings).
Stretch close bonus	£750	Personally close 10+ deals in a calendar month (paid on deal 10).

## 7.3 Payment terms

- Commission is paid monthly, on cash collected during the prior month.
- Commission is paid through your recruiting company: the company reports earned commission at month-end; the recruiting company invoices and disburses.
- If a customer defaults or stops paying mid-plan, commission stops accruing on that deal. Commission already paid is not clawed back.
- If a customer refunds, no further commission is paid on that deal; commission already paid on amounts collected is retained.
- If you leave (for any reason), you earn on cash collected up to your last day. No commission accrues after that date, even on deals you closed.

## 8. Acknowledgement & Signature

By signing below you confirm that:

1. You have read and understood every section of this document.
2. You understand the tier system and that you start on Tier 4 access only.

3. You understand the ramped standards and the minimums at each phase.
4. You understand that three strikes means termination, regardless of other performance.
5. You understand the non-negotiable fail conditions and that they cannot be appealed.
6. You understand the commission structure and how cash collected affects pay.
7. You have had the chance to ask questions about anything in this document.

<p><b>Sales Representative</b></p> <p>Signature: _____</p> <p>Printed name: _____</p> <p>Date: _____</p>	<p><b>Company Representative</b></p> <p>Signature: _____</p> <p>Printed name: _____</p> <p>Date: _____</p>
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## Appendix A: Weekly 1:1 Template

*Used by the Sales Manager in the weekly individual check-in. It is the written record of strikes, action items and acknowledgement.*

Rep name: \_\_\_\_\_ Week #: \_\_\_\_\_ Date: \_\_\_\_\_

Phase (circle): Wks 1 to 2 Onboarding | Wks 3 to 5 Early | Wks 6 to 9 Building | Wks 10 to 12 Full

Tier access:  Tier 4  Tier 3  Tier 2  Tier 1

### This week's metrics

Metric	Standard	Actual	Status
Meaningful conversations / day (avg)			<input type="checkbox"/> Pass <input type="checkbox"/> Strike
Discoveries booked			<input type="checkbox"/> Pass <input type="checkbox"/> Concern
Show-up rate			<input type="checkbox"/> Pass <input type="checkbox"/> Concern
Close rate	15%+		<input type="checkbox"/> Pass <input type="checkbox"/> Concern
Closes (week / cumulative)	8 total		-

## Strike status

Strikes issued this week (circle): None / Activity / Pipeline / Coaching

Total strikes to date: \_\_\_\_\_ of 3. If issued, what specifically triggered it:

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## Action items for next week

*Specific, measurable, with a deadline. Failure to complete = coaching strike.*

1. \_\_\_\_\_ Due: \_\_\_\_\_

2. \_\_\_\_\_ Due: \_\_\_\_\_

3. \_\_\_\_\_ Due: \_\_\_\_\_

Rep signature: \_\_\_\_\_ Manager signature: \_\_\_\_\_

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*Template note: this is a template to adapt to your business and your jurisdiction. Probation, strike and termination terms must be checked against local employment law (UK and/or South African) and built into the actual contract of employment before use.*