

KEY RESULTS AREA

EXAMPLES

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EXAMPLE 1

EntreLeadership

Role: Associate Director of All Access
Regular Office Hours: 8:30-5:30
Date: April 20, 2017

Summary:

This role is responsible for leading our coaching team in creating value for our clients and for our business. This role reports directly to the Director of All Access and serves as a proxy for the Director when required.

Key Results Area #1 - Coach Clients

- **Executive Masterminds (100-120 members)**
 - Personally facilitate mastermind session 2-3 times per week with members that lead the most mature businesses within the membership
 - Act as a backup facilitator for the other coaches when they are out of office
- **eCoaching**
 - Conduct Weekly sessions on core content with (200-300) members

Key Results Area #2 - Lead Coaching Team

- **Mastermind Experience/Value**
 - Lead team in designing and delivering the EL Mastermind experience for our clients.
- **Mastermind Attendance**
 - Assist in maximizing Mastermind attendance
- **Coaches**
 - Serve coaching team by helping them grow as coaches and provide leadership for them within Ramsey Solutions

Key Results Area #3 - Develop Products/Services

- **All Access Onboarding**
 - Work with product team to improve onboarding of new clients
 - Conduct onboarding sessions at live events
- **All Access Retention**
 - Work with product team to improve engagement of clients

Chad Smith

Team Member's Name

04/20/17

Date

John Felkins

Team Leader's Name

04/20/17

Date

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EXAMPLE 2

EntreLeadership

Role: EntreLeadership Sales Advisor
Regular Office Hours: 7:30-4:30
Date: March 1, 2017

Summary:
Summary: The sales advisor is responsible for selling three high-end events and an online coaching program, as well as successfully becoming an advocate for our clients. This role reports to the Director of Sales.

Key Results Area #1 - Revenue Generator

- Forecast and hit monthly goals for:
 - Master Series - Sell 40
 - Summit - Sell 300
 - All Access - Sell 11 per month
 - Boot Camp - Sell 5 per month
 - Maintain activity of three hours and 45 calls every day
 - Improve closing ratio

Key Results Area #2 - Help Sales Team Win

- Proactively maintain team culture and positive personal brand
- Be a person of influence and action

Key Results Area #3 - Build Successful Client Relationships

- Host and super serve at all EntreLeadership events
- Create long-term client engagement
- Follow-up on all event and new All Access members

Jenny DeLong _____ *03/01/17*
Team Member's Name Date

Sarah Sloyan _____ *03/01/17*
Team Leader's Name Date

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EXAMPLE 3

EntreLeadership

Role: Executive Assistant to EVP of Business to Business
Regular Office Hours: 5:00-8:00
Date: December 10, 2016

Summary:

The executive assistant serves their leader for business and family needs. This role reports directly to their leader.

Key Results Area #1 - Serve the Leader in His Day-to-Day Work

- Keep meeting and office work times in balance.
- Maintain leader's calendar.
- Keep leader informed of project deadlines.
- Act as a liaison between leader and B2B team members.
- Keep leader informed about our team members. Birthdays, company anniversaries, great accomplishments, etc. Help them remain available and maintain a healthy working relationship with each individual team member.

Key Results Area #2 - Manage Processes and Procedures

- Manage committee agendas and procedures in which leader is chair of.
- Keep up to date with new department and companywide projects, processes and procedures.
- Assist in Operating Board meeting arrangements and setup.
- Audit HR documents for B2B division.
- Attend bi-weekly Operating Board Admin meetings. Work on projects based on processes and procedures.

Key Results Area #3 - Maintain Department's Budget

- Maintain leader's debit expenses. Have them approve team expenses. Send expenses to accounting.
- Maintain B2B petty cash account.
- Deploy and maintain payroll processes for B2B departments.
- Facilitate in payroll process in regards to compensation changes. Communicate with leaders, HR and payroll on all changes.

Marie Johnson

Team Member's Name

12/10/16

Date

Jack Galloway

Team Leader's Name

12/10/16

Date