

Monthly 121 Form

Check in:

How has your month been and how are you feeling?
(include win of the month and biggest challenge)

Billings:

- ◀ Target:
- Actual:
- ↪ Target for this coming month:

Data Analysis:

- ◀ KPI's Target
- KPI's Actual
- ↪ KPI's for month ahead to meet Target

Pipeline:

- ◀ Roles on and status
- Leads and pipeline roles
- ↪ What is your sourcing plan for the coming month?

BD Plan:

- ◀ Top 10 clients to target & how
- Socials/branding/marketing plan
- ↪ Existing accounts to nurture & how

Support/Training required:

- ◀ Plan to complete

Issues, concerns or feedback?

