

Date: [Date]

To: [Employee Name]

Position: Client Account Manager

Subject: Probationary Period Expectations and Objectives

Dear [Employee Name],

Welcome to the team. This letter outlines the specific performance expectations and objectives for your probationary period, which concludes on [Probation End Date].

During this period, your performance will be evaluated based on the following key areas:

**1. Portfolio Management and Retention**

- Successfully transition and introduce yourself to a portfolio of [Number] clients.
- Maintain a client retention rate of [Percentage]%.
- Identify and document key stakeholders for all assigned accounts.

**2. Communication and Responsiveness**

- Respond to all client inquiries within [Number] business hours.
- Schedule and conduct introductory meetings with top-tier clients within your first 30 days.
- Provide weekly status updates to the Department Head regarding account health.

**3. Product Knowledge and Proficiency**

- Complete all internal product training modules by [Date].
- Demonstrate the ability to perform a full product demonstration independently.
- Accurately use the CRM system to log all client interactions and update sales pipelines.

**4. Revenue Growth**

- Identify at least [Number] upsell or cross-sell opportunities within the existing client base.
- Achieve a target of [Amount] in expanded business revenue during the probationary term.

**Review Schedule:**

We will meet formally to discuss your progress on the following dates:

- 30-Day Review: [Date]
- 60-Day Review: [Date]
- Final Probationary Review: [Date]

Successful completion of the probationary period is contingent upon meeting these benchmarks and adhering to company policies. We are committed to providing you with the tools and support necessary to succeed in this role.

Sincerely,

[Manager Name]  
[Title]

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**Employee Acknowledgment:**

I acknowledge that I have received and understood the expectations outlined above.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_