

GENERAL USE SALES PERFORMANCE REVIEW TEMPLATE

Sales Activity Performance

Scale:

- 1 = Far Below Quota or Goal Expectation
- 2 = Slightly Below Quota or Goal Expectation
- 3 = Hit Quota or Goal Expectation
- 4 = Exceeded Quota or Goal Expectation
- 5 = Far Exceeded Quota or Goal Expectation

Note: You can replace each activity with ones suitable for the specific sales role and fill in your corresponding notes

Activity	Metric	Rating	Notes
Lead Generation	X leads generated	3	Hit lead generation goal for the quarter
Sales Presentation Effectiveness	X% rate of presentations to proposals sent	4	Exceeds company average for this conversion rate
Closing Deals	4	4	Exceeded goal for deals closed
TOTAL	-	11	Strong sales performance, particularly during the later stages of the sales process

Miscellaneous Job Performance

Scale:

1 = Below Expectations

2 = Meets Expectations

3 = Exceeded Expectations

Activity	Rating	Notes
Workplace Professionalism	3	Consistently shows up on time and acts professionally in the workplace
Coachable	2	Meets expectations for eagerness to learn
Project Management	3	Did a great job handling non-sales projects such as the CRM migration and new sales rep onboarding
TOTAL	8	Employee exhibits solid workplace performance relating to non-sales activities and attributes