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** |