**CUSTOMER SERVICE/ACCOUNT MANAGEMENT PERFORMANCE REVIEW TEMPLATE**

**Account Manager/Customer Service Rep Name:** *[Name]*  **Rep Title:** *[Name]*

**Date of Performance Review:** *[Date]*

**Person Conducting Review:** *[Name]*  **Review Job Title:** *[Name]*

**Sales Performance Review Scope:** *[Explanation of the purpose of the sales performance review]*

**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

| **Factor/Sales Activity** | **Metric** | **Rating** | **Notes** |
| --- | --- | --- | --- |
| Customer/Client  Support Management | # service tickets satisfied | [1-5] | [Feedback, notes, reason for rating] |
| Customer/Client  Satisfaction | [Avg. satisfaction score given by  customers] | [1-5] | [Feedback, notes, reason for rating] |
| Support Efficiency | [Avg. time it takes to satisfied service ticket or client  request] | [1-5] | [Feedback, notes, reason for rating] |
| Upselling Activity | [# of upselling  attempts] | [1-5] | [Feedback, notes, reason for rating] |
| Upselling Success | [% of upselling  successes to  upselling attempts] | [1-5] | [Feedback, notes, reason for rating] |

| Cross-Selling Success | [# of cross-selling attempts] | [1-5] | [Feedback, notes, reason for rating] |
| --- | --- | --- | --- |
| Cross-Selling Success | [% of cross-selling successes to cross selling attempts] | [1-5] | [Feedback, notes, reason for rating] |
| Revenue Management | [$ account revenue managed] | [1-5] | [Feedback, notes, reason for rating] |
| Revenue Generation | [$ revenue  generated  from account  management,  upselling, and  cross-selling  activities] | [1-5] | [Feedback, notes, reason for rating] |
| Customer Retention | [% of customers/ clients that remain period-to-period] | [1-5] | [Feedback, notes, reason for rating] |
| Other [Insert Other  Activity or Factors] | [Metric] | [1-5] | [Feedback, notes, reason for rating] |
|  | **TOTAL** | **-** | **[Sales Performance Summary]** |

**Miscellaneous Job Performance**

**Scale:**

1 = Below Expectations

2 = Meets Expectations

3 = Exceeded Expectations

| **Factor** | **Rating** | **Notes** |
| --- | --- | --- |
| Workplace  Professionalism:  Punctuality and  Appropriate Behavior | [1-3] | [Feedback, notes, reason for rating] |
| Motivation and Attitude | [1-3] | [Feedback, notes, reason for rating] |
| Time Management | [1-3] | [Feedback, notes, reason for rating] |
| Project and Task  Management | [1-3] | [Feedback, notes, reason for rating] |
| Eagerness to Learn | [1-3] | [Feedback, notes, reason for rating] |
| Communication and Collaboration with  Others | [1-3] | [Feedback, notes, reason for rating] |
| Technology and Process Adoption | [1-3] | [Feedback, notes, reason for rating] |
| Attention to Detail | [1-3] | [Feedback, notes, reason for rating] |
| **TOTAL** | **-** | **[Miscellaneous Job Performance Summary]** |

**Additional Notes and Plan of Action**

[Notes on the sales performance review meeting, plan of action to fix lackluster performance issues, and information on compensation or solutions to motivating employee to continue solid performance]

