**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]

