**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** |

