**INSIDE SALES PERFORMANCE REVIEW TEMPLATE**

| ***Sales Rep Name:*** *[Name]* | ***Sales Rep Title:*** *[Name]* |
| --- | --- |
| ***Date of Performance Review:*** *[Date]* |  |
|  |  |
| ***Person Conducting Review:*** *[Name]* | ***Reviewer Job Title:*** *[Name]* |

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

**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

| **Factor/Sales Activity**  | **Metric**  | **Rating**  | **Notes** |
| --- | --- | --- | --- |
| Prospect Research Activity | [# unqualified leads generated/ data entries in CRM] | [1-5]  | [Feedback, notes, reason for rating]  |
| Cold Calling Activity  | [# cold calls made]  | [1-5]  | [Feedback, notes, reason for rating] |
| Email Introduction Activity  | [# cold emails sent]  | [1-5]  | [Feedback, notes, reason for rating] |
| Other Lead Generation Activity | [# leads pursued through other methods: Trade Shows, networking events, etc.] | [1-5]  | [Feedback, notes, reason for rating] |
| Lead Generation (Sales Presentations/Demos) | # of sales presentations/ demos set up | [1-5]  | [Feedback, notes, reason for rating] |

| Lead Generation Conversion | % of introduction activity that results in leads generated | [1-5]  | [Feedback, notes, reason for rating]  |
| --- | --- | --- | --- |
| Lead Generation Quality | # of leads generated that are high-quality | [1-5]  | [Feedback, notes, reason for rating] |
| Quality Lead Rate | % of leads generated that become qualified | [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]

