**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]

