**OUTSIDE SALES PERFORMANCE REVIEW TEMPLATE**

**Sales Rep Name:** *[Name]*  **Sales 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]*

**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** |
| --- | --- | --- | --- |
| Lead Qualification  Activity | [# of MQL or SQL generated] | [1-5] | [Feedback, notes, reason for rating] |
| Lead Nurturing Activity | [# of personal  nurturing touches such as calls or  emails] | [1-5] | [Feedback, notes, reason for rating] |
| Sales Forecasting | [Accuracy of  forecast based on current pipeline] | [1-5] | [Feedback, notes, reason for rating] |
| Sales Presentation/  Demo Success | [% of presentations or demos that  result in requested proposals | [1-5] | [Feedback, notes, reason for rating] |
| Proposal Generation | [# of proposals or contracts sent] | [1-5] | [Feedback, notes, reason for rating] |

| Deal Closing | [# of total deals closed] | [1-5] | [Feedback, notes, reason for rating] |
| --- | --- | --- | --- |
| Deal Closing Success | [% of deals closed from proposals  sent | [1-5] | [Feedback, notes, reason for rating] |
| Revenue Production | [$ revenue  generated] | [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]

