**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]

