

CUSTOMER SERVICE/ACCOUNT MANAGEMENT PERFORMANCE REVIEW TEMPLATE

Account Manager/Customer Service Rep Name: *[Name]*

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
Customer/Client Support Management	# service tickets satisfied	[1-5]	[Feedback, notes, reason for rating]
Customer/Client Satisfaction	[Avg. satisfaction score given by customers]	[1-5]	[Feedback, notes, reason for rating]
Support Efficiency	[Avg. time it takes to satisfied service ticket or client request]	[1-5]	[Feedback, notes, reason for rating]
Upselling Activity	[# of upselling attempts]	[1-5]	[Feedback, notes, reason for rating]
Upselling Success	[% of upselling successes to upselling attempts]	[1-5]	[Feedback, notes, reason for rating]

Cross-Selling Success	[# of cross-selling attempts]	[1-5]	[Feedback, notes, reason for rating]
Cross-Selling Success	[% of cross-selling successes to cross-selling attempts]	[1-5]	[Feedback, notes, reason for rating]
Revenue Management	[\$ account revenue managed]	[1-5]	[Feedback, notes, reason for rating]
Revenue Generation	[\$ revenue generated from account management, upselling, and cross-selling activities]	[1-5]	[Feedback, notes, reason for rating]
Customer Retention	[% of customers/clients that remain period-to-period]	[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]