

# OUTSIDE SALES PERFORMANCE REVIEW TEMPLATE

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**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
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]
	<b>TOTAL</b>	-	<b>[Sales Performance Summary]</b>

## 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]

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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]
<b>TOTAL</b>	-	<b>[Miscellaneous Job Performance Summary]</b>

### 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]