

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]