

Sample Performance Review | Salesperson | “Excelling”

1. For last quarter, describe your performance both in terms of accomplishments and behaviors. In your description, please be clear and specific.

ASSOCIATE (required comments)

I'm at \$3.5 million sold, which is way ahead of my \$2.1 million goal for the year.

MANAGER (optional comments)

I agree, you are significantly ahead of goal for the year. I appreciate you how drive for results by pushing yourself to go above and beyond expectations.

2. List your top priorities for the next quarter.

ASSOCIATE (required comments)

Keep on selling. I have a big meeting with the broker for Altercon next month. If can close that deal, I'll be over \$5 million sold for the year.

MANAGER (optional comments)

That would be great! Let's use the performance review to discuss how you plan to approach the broker and strategies for closing the sale.

3. Select the appropriate rating from the drop down menu.

Excelling

4. Explain your selection.

Your contributions mean a lot to our business. Keep up the great work.

Sample Performance Review | Salesperson | “Performing”

1. For last quarter, describe your performance both in terms of accomplishments and behaviors. In your description, please be clear and specific.

ASSOCIATE (required comments)

In our monthly 1-on-1s you see that I am on track to meet my annual sales goal of \$2.1. Last quarter I averaged 10 broker meetings per week, which generated 6 proposals for new groups.

I’m satisfied with my progress for the year thus far and look forward to more broker activity in the next quarter.

MANAGER (optional comments)

I agree. Nothing more to add here.

2. For next quarter, what performance objectives are your top priorities?

ASSOCIATE (required comments)

Same as usual – hit my \$2.1 million sales goal for the year.

MANAGER (optional comments)

Agreed. If you focus on activities we’ve identified - minimum of 10-15 broker meetings per week, 6 formal proposals per month, and building relationships whenever you get a chance – you should be on your way to meeting your goal.

3. Select the appropriate rating from the drop down menu.

Performing

4. Explain your selection.

You’re working on the right things and meeting your interim activity targets – now you need to close some more business. Keep putting in the good effort.

Sample Performance Review | Salesperson | “Struggling”

1. For last quarter, describe your performance both in terms of accomplishments and behaviors. In your description, please be clear and specific.

ASSOCIATE (required comments)

I think I’m doing the right things, my numbers just aren’t coming together for me. Last quarter I was proactive with all of my key accounts, but was only able generate 8 total proposals (the goal is 6 per month)

MANAGER (optional comments)

In our meeting, let’s go over your approach to building your sales pipeline. I want to better understand your process and see what I can do to help you. As we’ve discussed previously, success in sales isn’t always about the volume of connections you generate. It’s about driving for results – identifying potential barriers and ways to proactively push through them before they impact your ability to be successful.

2. For next quarter, what performance objectives are your top priorities?

ASSOCIATE (required comments)

Same as usual – hit my \$2.1 million annual goal

MANAGER (optional comments)

As I mentioned earlier, let’s review your brokers and see where you should focus and be more assertive for the remainder of this year. I expect you to hit that goal by the end of this year. Let’s make sure you’re well positioned so you can do everything possible to make that happen.

3. Select the appropriate rating from the drop down menu.

Struggling

4. Explain your selection.

Meeting your sales target is required. By building relationships with the best-fit brokers and focusing on key activities – minimum of 10-15 broker meetings per week and generating 6 formal proposals per month – I am confident you can do it.

Sample Performance Review | Salesperson | “Developing”

1. For last quarter, describe your performance both in terms of accomplishments and behaviors. In your description, please be clear and specific.

ASSOCIATE (required comments)

Having just completed my first full quarter in the role, I felt like I learned a lot. Last month was my first month of fully hitting the activity targets – 10-15 broker meetings per week and 6 formal proposals for the month. Even though I haven’t sold anything yet, I am building relationships with brokers that I believe will pay off in the future.

MANAGER (optional comments)

The move from being a Sales Implementation lead to a Salesperson is a big change. While you already have strong relationships with some of the enrollment firms and you know our sales process, there is a lot to learn to be successful. You’re 4 months into the job and you’re off to a good start. By next quarter we should see some sales from you. If you have concerns with that timeline then let’s discuss at the performance review to create a plan that you’re comfortable with and gets your numbers up to where they need to be.

In the meantime, let’s plan to have more frequent 1-on-1s. These conversations will be a chance to provide more coaching and feedback about how to move prospects forward and increase your close rate to get more sales.

2. For next quarter, what performance objectives are your top priorities?

ASSOCIATE (required comments)

Keep meeting the activity targets and sell something to begin meeting my \$1 million sales goal for this year.

MANAGER (optional comments)

Agreed. Success in your Sales Implementation role frequently depended on your ability to complete a high volume of tasks by a given deadline. A big part of Sales success is working strategically – using critical thinking to develop a strategy, then weighing options, overcoming obstacles, and continually assessing progress. Let’s spend some time in the performance review focusing on your approach to ensure you’re working strategically.

3. Select the appropriate rating from the drop down menu.

Developing

4. Explain your selection.

As I mentioned earlier, you’re still new to selling so it is to be expected there is a learning curve. You have already made great progress and will continue to do so. Let’s plan for you to be hitting your numbers next quarter and change this rating to “Performing.”