

FIELD PERFORMANCE

Evaluation

SALES REP NAME: _____ TITLE: _____

REVIEWER NAME: _____ TITLE: _____

EVALUATION DATE: ____ / ____ / ____ FROM: _____ A.M./P.M. TO: _____ A.M./P.M.

Evaluate Client Care Visit and prospecting sales performance including preparation, punctuality, professionalism, presentation mechanics, closing skills, objection handling, prospecting, customer service, time management, referral generation, and diversity sales.

Customer: _____ Time: _____ Contact: _____

Primary Goal:

Secondary Goal:

Sale: _____ Rev: _____ RMR: _____

Comments:

Customer: _____ Time: _____ Contact: _____

Primary Goal:

Secondary Goal:

Sale: _____ Rev: _____ RMR: _____

Comments:

Evaluate skill to provide insight into results detailed above on a 1-5 point scale with a 5 rating being the highest.

Performance Skills

Appearance and professionalism Rating (1-5): _____ Needs analysis Rating (1-5): _____

Product knowledge Rating (1-5): _____ Objection handling Rating (1-5): _____

Cloverleaf skills Rating (1-5): _____ Closing skills Rating (1-5): _____

System design Rating (1-5): _____ Pricing knowledge Rating (1-5): _____

Security services knowledge Rating (1-5): _____ Paperwork proficiency Rating (1-5): _____

Overall presentation Rating (1-5): _____ Referral gathering Rating (1-5): _____

5 - Exceeds all expectations/superlative 4 - Exceeds requirements/above expectations 3 - Meets requirements/fully satisfactory
2 - Needs to show progressive improvement/marginal 1 - Needs immediate attention and improvement/unsatisfactory

Overall Rating:

1) List three areas in which sales rep consistently performs well during this evaluation:

2) List two changes that will assist the sales rep to exceed expectations and increase earnings:

3) Identify steps or training needed to achieve desired improvement from above and state timeline:

Sales Representative Signature

Date

Sales Manager Signature

Date

