

MANAGER'S ONE-ON-ONE

Evaluation

SALES REP NAME: _____

DATE: _____

MANAGER NAME: _____

TERRITORY RECONNAISSANCE

How many client calls did they complete yesterday: _____ Number of cloverleaf calls from CV's: _____

How many new security system presentations did they complete yesterday _____ Number of cloverleaf's: _____

Did they do 50 Cloverleaf calls yesterday: _____ Attempts: _____ Contacts: _____ Sales: _____

How many referrals did they get yesterday: _____ How many referral appointments did they have: _____

How many door hangers did they hand out yesterday: _____ How many leads did they get: _____

Did they network with any spheres of influence: _____ Number of certificate of installations delivered: _____

Are they aware of the security events in their area: _____ Number of burglaries: _____ Number of fires: _____

Are they aware of the mover leads: _____ Number of homes for sale: _____ Number of homes sold: _____

ACTIVITY BEST PRACTICES

Are they checking in with you daily: _____ Activity updates: _____ Meetings: _____ Training: _____

Have you completed a ride-a-long with them: _____ Last time (date): _____

Are they completing a client care visit with 2 current customers each day: _____ How many: _____

Are they getting referrals from each client visit: _____ Do they update the call list: _____

Do they cloverleaf a minimum of 25 homes on each client care visit and new sales appointment:
Before: _____ After: _____

Are they making 50 door-to-door calls each day: _____ Around events: _____ Around crime: _____

Any local networking events or shows: _____ Any scheduled for the future: _____ When: _____

Affinity programs (large employers): _____ Any planned: _____ Who: _____

Are they mailing thank you cards daily: _____ Number of thank you cards mailed this week: _____

Sales Representative Signature

Date

Sales Manager Signature

Date

