

MONTHLY SALES ASSESSMENT

Worksheet

SALES REP NAME: _____

REVIEW MONTH: _____

The sales assessment helps the sales manager give performance status/feedback to their sales reps based on sales standards. If minimum standards are not met, an action plan is recommended to assist the sales rep in meeting and exceeding his/her sales goals.

	Minimum Expectations	Current Month	3-Month Average	6-Month Average	Performance Rating*
Attempts					
Contacts					
Leads					
Sales					
Client Care Visits					
Average Sale Price					

*O - Outstanding M - Meets minimum standards BM - Below minimum standards U - Unacceptable

Areas of strength:

Areas of development:

Comments/Notes:

Action plan: Yes No

My signature acknowledges I have been informed of the contents of this document but does not necessarily indicate agreement.

Sales Representative Signature

Date

Sales Manager Signature

Date

