

Candidate Name: \_\_\_\_\_  
Role Interviewed: \_\_\_\_\_  
Interviewer: \_\_\_\_\_  
Date: \_\_\_\_\_

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## Dimensions

- **Customer Relationship Management — Score (1–5): \_\_\_\_\_**  
1-2: Reactive outreach, weak rapport, repeated customer dissatisfaction. 3: Maintains regular contact, understands customer goals, resolves routine requests. 4: Proactively identifies needs, builds trusted relationships, drives improved satisfaction. 5: Acts as trusted advisor, shapes customer strategy, drives measurable reduction in churn.
- **Renewals & Expansion — Score (1–5): \_\_\_\_\_**  
1-2: Misses renewal signals and fails to pursue upsell opportunities. 3: Manages renewals on schedule and identifies obvious expansion leads. 4: Consistently secures renewals and closes planned upsell opportunities. 5: Creates and executes expansion strategies, regularly exceeds renewal and upsell targets.
- **Onboarding & Adoption — Score (1–5): \_\_\_\_\_**  
1-2: Slow or incomplete onboarding; customers struggle to adopt product. 3: Delivers standard onboarding, reaches baseline adoption milestones. 4: Optimizes onboarding processes and accelerates time-to-value for customers. 5: Designs scalable programs that significantly increase adoption and retention.
- **Escalation & Problem Solving — Score (1–5): \_\_\_\_\_**  
1-2: Avoids ownership of issues or fails to coordinate responses to escalations. 3: Resolves common escalations and follows through on fixes. 4: Quickly isolates root causes, coordinates cross-team fixes, and communicates status. 5: Prevents repeat issues by driving systemic changes and influencing product improvements.
- **Product & Technical Knowledge — Score (1–5): \_\_\_\_\_**  
1-2: Limited understanding of product capabilities and basic troubleshooting. 3: Knows key features and supports common configurations. 4: Explains complex features, configures solutions, and assists with integrations. 5: Acts as product expert who architects solutions and trains others.

1-2: Unclear or untimely communication that creates misalignment. 3: Provides clear, timely updates and manages expectations. 4: Tailors messaging to different stakeholders and secures buy-in. 5: Influences executive stakeholders and aligns cross-organizational priorities.

• **Cross-functional Collaboration — Score (1–5): \_\_\_\_\_**

1-2: Operates in silos and provides poor handoffs to internal teams. 3: Collaborates with Sales, Support, and Product when needed and shares context. 4: Proactively partners to resolve customer issues and improve processes. 5: Leads cross-functional initiatives that measurably improve customer outcomes.

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## Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):