Candidate Name: _____
Role Interviewed: _____
Interviewer: _____
Date: _____

Dimensions

• Closing & Pipeline Management — Score (1–5): _____

  1-2: Fails to advance opportunities; cannot articulate next steps or timelines. 3: Regularly closes routine deals and follows a clear next-step cadence. 4: Consistently hits close rates above team average and manages follow-ups proactively. 5: Predictably closes complex deals, accelerates stalled opportunities, and improves team close metrics.

• Qualification & Discovery — Score (1–5): _____

  1-2: Asks generic questions and fails to identify pain, budget, or decision timeline. 3: Uncovers basic pain points, decision makers, and timeline for typical deals. 4: Identifies root causes, budget authority, and quantifies impact to tailor proposals. 5: Leads discovery that reshapes opportunity strategy and uncovers expansion motion.

• Sales Process & Execution — Score (1–5): _____

  1-2: Does not follow sales stages or escalation rules; inconsistent follow-up. 3: Follows core sales process reliably and completes required stages. 4: Maps opportunities to process with accurate forecasting and timely moves. 5: Optimizes process execution, mentors peers on best practices, and reduces slip.

• Objection Handling & Negotiation — Score (1–5): _____

  1-2: Avoids pushback or concedes immediately; cannot counter common objections. 3: Handles common objections with prepared responses and trade-offs. 4: Negotiates terms that protect margin while closing deals frequently. 5: Turns objections into opportunities, secures favorable terms, and trains others.

• Communication & Rapport — Score (1–5): _____

  1-2: Poor clarity or tone; struggles to build trust with prospects. 3: Communicates clearly, listens actively, and builds basic rapport. 4: Adapts messaging to stakeholder needs and builds strong credibility. 5: Influences senior stakeholders and fosters long-term relationships.

1-2: Records incomplete or inaccurate CRM data; misses follow-up reminders. 3: Keeps CRM up to date and uses it to manage daily activity. 4: Maintains clean records, uses analytics for prioritization, and forecasts reliably. 5: Drives data quality improvements and leverages CRM to increase team productivity.

• Team Collaboration & Handoffs — Score (1–5): _____

1-2: Fails to coordinate with account managers or support teams; creates friction in handoffs. 3: Provides required context and completes handoffs reliably. 4: Collaborates proactively with cross-functional teams to close deals. 5: Leads cross-team initiatives that reduce churn and speed onboarding.

Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):