

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

Dimensions

- Sales process design — Score (1–5): _____
1-2: Keeps broken or undocumented processes; cannot explain handoffs. 3: Follows and documents standard processes and fixes routine gaps. 4: Redesigns workflows to remove bottlenecks and measures impact. 5: Defines scalable end-to-end processes and drives organization-wide adoption.
- CRM & systems proficiency — Score (1–5): _____
1-2: Cannot complete basic CRM tasks or frequently breaks configurations. 3: Performs admin tasks, builds reports, and manages data hygiene. 4: Implements automations, integrations, and enforces system standards. 5: Architects system strategy and leads complex cross-system integrations.
- Data analysis & reporting — Score (1–5): _____
1-2: Produces error-prone or superficial reports and misses trends. 3: Delivers accurate standard reports and explains trends clearly. 4: Provides actionable insights, segmentation, and causal analysis. 5: Builds predictive models and shapes sales strategy with analytics.
- Cross-functional collaboration — Score (1–5): _____
1-2: Misses coordination with sales, finance, or marketing and misses commitments. 3: Communicates clearly and meets stakeholder requirements reliably. 4: Proactively resolves conflicts and aligns priorities across teams. 5: Builds partnerships, influences leaders, and secures resources for initiatives.
- Forecasting & pipeline support — Score (1–5): _____
1-2: Generates unreliable forecasts and ignores pipeline hygiene. 3: Maintains clean pipeline and supports regular forecasting cadence. 4: Improves accuracy with root-cause analysis and process adjustments. 5: Owns forecasting methodology and materially increases predictability.

1-2: Fails to deliver projects on scope or timeline and resists change. 3: Delivers projects on time with basic stakeholder updates. 4: Drives cross-functional projects with clear milestones and adoption plans. 5: Leads large transformations with measured adoption and ROI.

• Coaching & enablement — Score (1–5): _____

1-2: Provides little or no training materials and no follow-up. 3: Creates playbooks and runs regular training for reps. 4: Customizes enablement, measures uptake, and iterates content. 5: Builds scalable enablement programs that increase rep productivity.

Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):