Candidate Name: _____

Role Interviewed: _____

Interviewer: _____

Date: _____

Dimensions

• Revenue attainment & closing — Score (1–5): _____

  1-2: Misses quota repeatedly; unable to close opportunities presented by the team. 3: Meets quota regularly using predictable sales cycles and follow-through. 4: Exceeds quota consistently through strong deal management and timing. 5: Consistently overachieves quota and influences territory plan to drive incremental revenue.

• Pipeline generation & prospecting — Score (1–5): _____

  1-2: Depends entirely on inbound leads; rarely sources new opportunities. 3: Proactively fills funnel with a steady stream of qualified leads. 4: Creates predictable pipeline from multiple channels and scales outreach. 5: Builds high-quality demand streams and mentors others on scalable prospecting.

• Account strategy & expansion — Score (1–5): _____

  1-2: Lacks plans for existing accounts; reactive to renewal or upsell opportunities. 3: Develops account plans that identify logical expansion opportunities. 4: Executes multi-quarter land-and-expand plays and secures upsells. 5: Designs scalable expansion strategies that materially grow account lifetime value.

• Relationship & stakeholder management — Score (1–5): _____

  1-2: Fails to build trust with key contacts; relationships are transactional or broken. 3: Maintains reliable relationships with primary decision-makers. 4: Builds broad sponsor networks and navigates complex buying groups. 5: Creates executive-level advocacy and influences long-term customer direction.

• Negotiation & commercial acumen — Score (1–5): _____

  1-2: Accepts unfavorable terms or gives discounts without rationale; weak commercial judgment. 3: Manages pricing and terms to protect margin while closing deals. 4: Constructs creative commercial proposals and protects company economics. 5: Leads complex negotiations, drives high-margin outcomes, and trains others on deal structure.

1-2: Lacks basic product understanding and cannot articulate customer value. 3: Explains product fit and competitive positioning to buyers accurately. 4: Maps product to customer business outcomes and anticipates objections. 5: Shapes product positioning, provides market insights, and influences roadmap conversations.

• Cross-functional collaboration & CRM discipline — Score (1–5): _____

1-2: Does not update CRM; poor handoffs to customer success or product teams. 3: Maintains CRM hygiene and coordinates necessary handoffs reliably. 4: Drives cross-functional alignment on deal plans and post-sale transitions. 5: Leads cross-team processes to improve win rates and onboarding outcomes.

Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):