Candidate Name: _____

Role Interviewed: _____

Interviewer: _____

Date: _____

Dimensions

• Account Strategy & Planning — Score (1–5): _____

1-2: No clear account plan; reactive activities without defined objectives or milestones. 3: Creates basic account plans with target outcomes and key stakeholders identified. 4: Develops multi-year account strategies with prioritized opportunities and risk mitigation. 5: Leads account transformation plans that align with customer objectives and drive new business models.

• Pipeline & Forecast Accuracy — Score (1–5): _____

1-2: Pipeline is inaccurate or inflated; cannot explain deal stages or timing. 3: Maintains pipeline and gives reasonable explanations for forecasts. 4: Regularly produces reliable forecasts and updates based on deal evidence. 5: Consistently exceeds forecast accuracy through disciplined deal qualification and risk control.

• Revenue Generation & Quota Attainment — Score (1–5): _____

1-2: History of missed targets and inability to close sizable deals. 3: Meets quota with steady performance and predictable renewals/expansions. 4: Consistently delivers above quota through new logo wins and expansions. 5: Drives major revenue growth, opens strategic accounts, and expands enterprise footprints.

• Relationship Building & Stakeholder Influence — Score (1–5): _____

1-2: Struggles to engage senior stakeholders or maintain relationships. 3: Builds reliable relationships with primary sponsors and users. 4: Influences multiple stakeholders and secures executive buy-in. 5: Shapes customer strategy, becomes trusted advisor across executive teams.

• Solution & Commercial Acumen — Score (1–5): _____

1-2: Limited understanding of product value or commercial levers. 3: Explains how product solves customer problems and commercial terms. 4: Tailors value propositions to customer economics and competitive landscape. 5: Crafts creative commercial models that increase deal value and margin.

1-2: Poor negotiation outcomes; accepts unfavorable terms or stalls deals. 3: Manages standard negotiations and closes contracts with acceptable terms. 4: Navigates complex terms, mitigates risk, and shortens close cycles. 5: Leads high-stakes negotiations to win strategically important, low-risk contracts.

• Cross-functional Collaboration & Execution — Score (1–5): _____

1-2: Works in isolation; fails to align with CS, Product, or Marketing. 3: Collaborates with internal teams to deliver commitments and handoffs. 4: Coordinates cross-functional resources to execute strategic account initiatives. 5: Mobilizes multiple teams to deliver integrated, high-impact customer outcomes.

Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):