

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

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## Dimensions

- **Territory Revenue & Quota Achievement — Score (1–5): \_\_\_\_\_**  
1-2: Misses quota repeatedly without corrective plan; unclear on revenue drivers. 3: Meets quota consistently with standard effort and predictable processes. 4: Exceeds quota regularly through targeted actions and opportunity focus. 5: Consistently outperforms forecast; creates stretch growth and scales wins across the territory.
- **Pipeline Development & Prospecting — Score (1–5): \_\_\_\_\_**  
1-2: Rarely generates new leads; relies solely on inbound or referrals. 3: Maintains a healthy pipeline with scheduled prospecting activities. 4: Builds diversified pipeline sources and accelerates lead conversion. 5: Creates repeatable prospecting programs that scale pipeline and shorten sales cycle.
- **Account Management & Retention — Score (1–5): \_\_\_\_\_**  
1-2: Reactive with churn or frequent service escalations under their watch. 3: Keeps renewals on track and resolves routine service issues. 4: Proactively grows key accounts and reduces churn risk through value delivery. 5: Transforms customers into advocates and creates multi-year expansion opportunities.
- **Negotiation & Closing — Score (1–5): \_\_\_\_\_**  
1-2: Accepts unfavorable terms or walks away from deals frequently. 3: Closes deals at acceptable margins using standard negotiation tactics. 4: Closes complex deals while protecting margin and company interests. 5: Leads high-value negotiations, creates win-win structures, and shortens close cycles.
- **Territory Strategy & Planning — Score (1–5): \_\_\_\_\_**  
1-2: No documented territory plan; cannot prioritize accounts or activities. 3: Has a basic territory plan with clear targets and activity cadence. 4: Uses data to prioritize segments and adjusts plan for seasonality or competitive moves. 5: Designs and executes multi-quarter territory expansion strategies with measurable ROI.

1-2: Poor handoffs and few updates; creates friction with ops or support. 3: Communicates clearly with customers and internal teams; reliable handoffs. 4: Aligns stakeholders, drives joint action, and escalates proactively. 5: Influences cross-functional strategy, mentors peers, and removes systemic blockers.

• CRM Discipline & Sales Analytics — Score (1–5): \_\_\_\_

1-2: Sparse or inaccurate CRM records; cannot produce pipeline reports. 3: Maintains accurate CRM entries and uses basic reports for forecasting. 4: Leverages CRM data to refine forecasts and prioritize deals. 5: Uses analytics to identify trends, improve conversion rates, and coach teammates.

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## Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):