

Sales Representative Performance Review Checklist

Use this **sales representative performance review checklist** to effectively evaluate key skills, achievements, and areas for improvement. It ensures a thorough assessment of sales targets, client management, and communication abilities. Regular reviews help boost productivity and career growth.

1. Sales Targets & Revenue

- Achieved/exceeded individual sales targets
- Consistent sales performance across review period
- Contribution to team sales goals

2. Client Management

- Builds and maintains strong client relationships
- Effectively manages client accounts
- Responds promptly to client inquiries and issues

3. Product Knowledge

- Demonstrates thorough knowledge of products/services
- Communicates product benefits to clients
- Stays updated with new features and offerings

4. Communication Skills

- Clear and persuasive verbal communication
- Effective written communication (emails, proposals, reports)
- Active listening and comprehension skills

5. Teamwork & Collaboration

- Works collaboratively with colleagues and management
- Shares best practices and supports team members
- Participates in team meetings and initiatives

6. Initiative & Problem Solving

- Proactively seeks opportunities and leads
- Addresses challenges and obstacles efficiently
- Contributes new ideas for process and sales improvement

7. Professional Development

- Pursues ongoing training and development
- Seeks feedback and applies learning
- Demonstrates growth over review period

8. Areas for Improvement

- Identified skill gaps and pursuit of solutions
- Goal-setting for next review period
- Plans and actions for continuous improvement

Comments & Notes

Add comments, feedback, or observations

This checklist should be reviewed and customized to fit specific company goals and requirements, and can serve as a tool for ongoing development conversations.