

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.