

Sales Team Performance Assessment Form

Use this **Sales team performance assessment form** sample to effectively evaluate key performance indicators (KPIs) and track the productivity of your sales staff. This form highlights essential metrics such as sales targets, conversion rates, and customer engagement. Implementing this tool streamlines performance reviews and helps identify areas for improvement.

Salesperson Details				
Name:	<input type="text"/>			
Role/Title:	<input type="text"/>			
Assessment Period:	<input type="text"/> e.g. Q1 2024			

Key Performance Indicators (KPIs)

KPI	Description	Target	Actual	Comments
Sales Volume	Total sales achieved in the period	<input type="text"/>	<input type="text"/>	<input type="text"/>
Conversion Rate	Percentage of leads converted to sales	<input type="text"/> %	<input type="text"/> %	<input type="text"/>
Customer Engagement	Number of follow-ups, meetings, or demos conducted	<input type="text"/>	<input type="text"/>	<input type="text"/>
New Clients Acquired	Number of new clients signed	<input type="text"/>	<input type="text"/>	<input type="text"/>
Customer Retention Rate	Percentage of clients retained	<input type="text"/> %	<input type="text"/> %	<input type="text"/>

Overall Performance Summary

Key Strengths:

Areas for Improvement:

Manager Comments:

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