

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:

Role/Title:

Assessment Period:

e.g. Q1 2024

Key Performance Indicators (KPIs)

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

Overall Performance Summary

Key Strengths:

Areas for Improvement:

Manager Comments:

Submit Assessment

