

Candidate Name: _____
Role Interviewed: _____
Interviewer: _____
Date: _____

Dimensions

- **Strategic Account Planning — Score (1–5): _____**
1-2: No documented account plan or goals not tied to business outcomes. 3: Creates basic account plans with revenue targets and activity calendar. 4: Develops multi-quarter plans with prioritized initiatives and risk mitigation. 5: Builds account strategy that shifts client roadmap and unlocks new revenue streams.
- **Relationship Management — Score (1–5): _____**
1-2: Engages sporadically and only with low-level contacts. 3: Maintains regular contact and reliably services primary stakeholders. 4: Builds trusted relationships across multiple decision-makers and influencers. 5: Acts as a strategic advisor to executive sponsors and shapes long-term client direction.
- **Sales Execution & Negotiation — Score (1–5): _____**
1-2: Misses targets and loses simple negotiation points. 3: Consistently closes renewals and meets quota on standard deals. 4: Wins complex renewals and expansions and handles objections proactively. 5: Negotiates multi-year, high-value deals with favorable commercial terms.
- **Product & Industry Knowledge — Score (1–5): _____**
1-2: Limited product or industry understanding; cannot map value to client needs. 3: Understands key product capabilities and relevant industry trends. 4: Anticipates client needs using deep industry insight and recommends fit solutions. 5: Influences product roadmap and competitive positioning with account insights.
- **Cross-functional Collaboration — Score (1–5): _____**
1-2: Works in isolation and rarely engages internal teams to resolve issues. 3: Coordinates with support, delivery, and product to meet commitments. 4: Leads cross-team initiatives to remove blockers and accelerate value delivery. 5: Orchestrates company-wide resources to achieve strategic account outcomes.

1-2: Reactive to issues with repeated escalations and unresolved causes. 3: Resolves customer issues promptly and prevents simple recurrences. 4: Proactively identifies churn risks and implements retention plans. 5: Drives systemic improvements that reduce churn and increase customer lifetime value.

• **Communication & Presentation — Score (1–5): _____**

1-2: Messages are poorly structured and fail to inform stakeholders. 3: Delivers clear updates and proposals tailored to audience level. 4: Presents persuasive cases that drive stakeholder decisions. 5: Inspires executive action through compelling narrative and data storytelling.

Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):