

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

Dimensions

- Sales Strategy & Planning — Score (1–5): _____

1-2: No clear go-to-market plan or relies solely on ad-hoc tactics. 3: Presents a coherent strategy tied to market segments and targets. 4: Builds multi-quarter plans with prioritized initiatives and KPIs. 5: Creates scalable national strategy that shifts market share and informs product or pricing decisions.

- Team Leadership & Coaching — Score (1–5): _____

1-2: Avoids people management responsibilities or has high turnover without corrective action. 3: Hires, sets goals, and conducts regular performance reviews. 4: Develops reps through coaching, career paths, and performance improvement plans. 5: Builds high-performing, scalable sales orgs and develops future leaders with measurable retention and promotion rates.

- Territory & Channel Management — Score (1–5): _____

1-2: Fails to segment accounts or misallocates coverage resources. 3: Defines territories and assigns coverage to meet market potential. 4: Optimizes channel mix and reallocates resources based on performance data. 5: Transforms territory design or channel strategy to capture new markets and improve ROI.

- Pipeline Management & Forecasting — Score (1–5): _____

1-2: Lacks pipeline discipline; forecasts are inaccurate and reactive. 3: Maintains pipeline hygiene and produces reliable forecasts within expected variance. 4: Implements processes to improve conversion rates and forecast precision. 5: Drives forecasting accuracy across the organization and mentors others on predictive indicators.

- Key Account & Major Deals — Score (1–5): _____

1-2: No experience closing or retaining large strategic accounts. 3: Manages major accounts and contributes to closing high-value deals. 4: Leads complex negotiations and coordinates cross-functional support for renewals/expansions. 5: Secures transformational, multi-year partnerships and expands strategic account footprint.

1-2: Operates in silos and fails to secure necessary internal support. 3: Coordinates with marketing, product, and operations to execute deals. 4: Aligns cross-functional teams to remove blockers and accelerate sales outcomes. 5: Shapes product or pricing through influence and drives company-level initiatives that enable sales.

• **Commercial & Financial Acumen — Score (1–5): ____**

1-2: Does not track margin, CAC, LTV, or cannot connect sales actions to P&L. 3: Understands revenue drivers, margin impact, and basic budgeting. 4: Uses financial metrics to prioritize deals, channels, and investments. 5: Optimizes commercial models, drives pricing strategy, and materially improves profitability.

Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):