

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

Dimensions

- **Prospecting & Pipeline — Score (1–5): _____**
1-2: Relies on inbound leads only; sporadic outreach and shallow pipeline. 3: Regularly generates outbound activity and maintains a qualified pipeline. 4: Proactively targets high-value accounts and consistently fills pipeline to forecast. 5: Builds repeatable prospecting systems that generate more high-quality opportunities than quota requires.
- **Territory & Account Planning — Score (1–5): _____**
1-2: No territory plan; reactive coverage and missed key accounts. 3: Maintains account list and prioritizes top targets by potential. 4: Segments territory and executes targeted campaigns that drive measurable growth. 5: Develops strategic territory plans that expand share and uncover new segments.
- **Product Knowledge & Presentation — Score (1–5): _____**
1-2: Cannot explain product value; reads generic script and misses customer needs. 3: Delivers clear demos and connects features to customer problems. 4: Tailors messaging to buyer persona and quantifies likely ROI. 5: Delivers consultative, data-backed presentations that influence multiple stakeholders.
- **Closing & Negotiation — Score (1–5): _____**
1-2: Avoids asking for business and concedes on price; loses at negotiation. 3: Asks for the sale and reliably closes standard deals. 4: Handles objections, negotiates terms, and protects margin. 5: Closes complex, multi-party deals quickly while securing favorable terms.
- **Relationship Building & Retention — Score (1–5): _____**
1-2: Transactional interactions; no follow-up post-sale. 3: Maintains relationships and secures renewals or referrals. 4: Builds trusted-advisor relationships and identifies expansion opportunities. 5: Creates strategic partnerships and drives measurable account expansion.

1-2: Poor communication with internal teams and fails to update CRM. 3: Communicates clearly with stakeholders and documents customer interactions. 4: Proactively coordinates with support, product, and marketing to advance deals. 5: Leads cross-functional efforts that remove blockers and improve sales outcomes.

• **Execution & Time Management — Score (1–5): _____**

1-2: Misses appointments and deadlines; inconsistent follow-up. 3: Manages schedule reliably and meets commitments to customers. 4: Prioritizes high-impact activities and consistently meets or exceeds targets. 5: Optimizes territory cadence and workflows to maximize sales productivity.

Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):