

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

Dimensions

- Sales Performance — Score (1–5): _____

1-2: Repeatedly misses quota and lacks a plan to recover. 3: Consistently meets quota and manages deal execution reliably. 4: Regularly exceeds quota and expands revenue within accounts. 5: Drives substantial, sustainable region-wide revenue growth and creates new revenue streams.

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

1-2: No clear territory segmentation or prioritization. 3: Develops a clear territory plan with account prioritization and targets. 4: Optimizes segmentation and reallocates resources to high-opportunity accounts. 5: Creates a scalable territory strategy that opens new segments and markets.

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

1-2: Pipeline is thin or unreliable and forecasts are inaccurate. 3: Maintains a healthy pipeline and provides reasonable forecasts. 4: Anticipates deal risks early and improves conversion rates. 5: Produces consistently accurate forecasts and improves pipeline quality across the region.

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

1-2: Provides little coaching; team underperforms or churns. 3: Regularly coaches reps and produces measurable skill improvement. 4: Raises overall team performance and develops top performers. 5: Builds a high-performing region, scales coaching processes, and consistently promotes talent.

- Cross-functional Collaboration — Score (1–5): _____

1-2: Does not engage operations, marketing, or product when needed. 3: Coordinates with other teams to remove blockers and support deals. 4: Aligns cross-functional resources to accelerate regional priorities. 5: Influences stakeholders to secure resources and drive cross-team initiatives.

1-2: Ignores data and has poor CRM hygiene. 3: Uses CRM accurately and applies basic analytics to decisions. 4: Leverages analytics to identify opportunities and improve win rates. 5: Builds dashboards and uses data to shift strategy and coach the team.

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

1-2: Communication is unclear and fails to persuade customers or stakeholders. 3: Delivers clear proposals and conducts effective customer conversations. 4: Persuades senior stakeholders and tailors messages to audiences. 5: Influences at the executive level and secures buy-in for strategic deals.

Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):