ZYTHR

Candidate Name: _____

Role Interviewed: _____

Interviewer: _____

Date: _____

Dimensions

• Data analysis & reporting — Score (1–5): _____

  1-2: Produces incorrect or uninterpretable reports and cannot query data reliably. 3: Builds accurate reports and pulls data using SQL/BI tools for routine questions. 4: Creates reusable dashboards, automates recurring reports, and surfaces actionable insights. 5: Designs advanced analytics and models that drive strategic decisions and forecasting.

• CRM & systems proficiency — Score (1–5): _____

  1-2: Struggles to navigate CRM, makes configuration errors, or cannot extract needed records. 3: Performs CRM data updates, custom views, and basic admin tasks reliably. 4: Configures workflows, automations, and integrations to improve sales efficiency. 5: Owns system design choices, optimizes integrations, and mentors other admins.

• Process design & improvement — Score (1–5): _____

  1-2: Ignores process gaps or proposes changes without assessing downstream effects. 3: Documents current processes and suggests incremental improvements that reduce friction. 4: Designs and implements scalable processes that reduce cycle time and errors. 5: Leads cross-functional redesigns that deliver measurable efficiency gains.

• Forecasting & pipeline management — Score (1–5): _____

  1-2: Misses basic pipeline hygiene and provides unreliable forecasts. 3: Maintains pipeline health, updates stages accurately, and produces reasonable forecasts. 4: Identifies forecast risks, adjusts assumptions, and improves forecast accuracy over time. 5: Develops predictive forecasting models and influences quota or strategy decisions.

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

  1-2: Fails to communicate requirements clearly, causing rework or misalignment. 3: Communicates clearly with sales, finance, and product to deliver projects. 4: Anticipates stakeholder needs, presents recommendations, and gains buy-in. 5: Influences senior leaders, aligns multiple teams, and drives cross-team initiatives.

1-2: Overlooks data mistakes that lead to misinformed decisions. 3: Validates data and catches common errors before reporting. 4: Implements checks, reconciliations, and automations to prevent data issues. 5: Builds data governance practices that minimize recurring data errors.

• Business acumen & commercial impact — Score (1–5): _____

1-2: Does not connect analyses to sales outcomes or revenue decisions. 3: Understands core sales metrics and ties work to team KPIs. 4: Provides recommendations that improve conversion, velocity, or revenue. 5: Drives initiatives that materially increase revenue or reduce operating cost.

Overall Evaluation

Strengths Observed:

Concerns / Weaknesses:

Recommendation (Yes / No / With Reservations):

Final Score (Avg / Weighted):