The Sales Evaluation

An **objective** evaluation can (and should) be a very effective tool for professional development (self-driven or not). Every month or so, consider formally investing 30 minutes in yourself and step through the points below as a **private** check on your **value and progress** as a sales professional (use what applies and adjust what's missing). Forget the fluff and examine yourself as your manager might (or ultimately will). Keep up the good, eliminate the bad and remember to always be moving toward your professional goals. Make self-evaluation a **consistent** part of your sales discipline and you are **guaranteed** to have better results…

let the questions below serve as a **guideline** to helping you evaluate your sales ultimately use them to consistently improved performance… use what you like, discard what you don't and add what you think is needed…

Contribution

1. sales revenue generated during the past [time period]
2. number of units sold during the past [time period]
3. number of new customers brought in during the past [time period]
4. growth (percentage) of each figure above over the previously measured period

Activity

1. number of outbound prospecting calls (dials or in-person) made during the past [time period] for new business
2. number of outbound prospecting calls (dials or in-person) made during the past [time period] for business from existing customers
3. number of initial sales interviews given during the past [time period]
4. number of presentations given during the past [time period]
5. number of proposals generated and delivered during the past [time period]
6. number of trade shows and/ or events (selling opportunities) attended during the past [time period]
7. growth (percentage) of each figure above over the previously measured period

Sales process skills

rate the general skill level in each area of the sales cycle that applies, on your preferred measurement basis (e.g., exceeds expectations, meets expectations, does not meet expectations, numeric, alpha, etc.)

1. prospecting
2. interviewing
3. needs analysis
4. presentation

5. negotiation
6. closing
7. service & follow-up skills

*note specific details where a rating is particularly high or low

rate the skill level of each that applies, on your preferred measurement basis (e.g., exceeds expectations, meets expectations, does not meet expectations, numeric, alpha, etc.)

1. asking questions
2. listening
3. qualifying
4. discovering hot buttons
5. building rapport
6. establishing trust
7. addressing objections
8. planning action steps
9. confirming understanding
10. asking for referrals
11. seeking additional selling opportunities
12. evaluating responses & results
13. affirming decisions
14. developing credibility
15. developing a valuable relationship
16. maintaining a positively expectant attitude
17. managing selling time
18. territory management
19. sales tracking, reporting and general paper work

*note specific details where a rating is particularly high or low

general professional skills & characteristics
use the following list as a thought prompt for general characteristics & skills evaluation…

1. work ethic
2. integrity
3. flexibility
4. decision making ability
5. willingness to take risks
6. communication
7. impact on others within the organization
8. leadership

Product knowledge

1. new product/ service knowledge acquired during the past [time period]

2. new industry knowledge acquired during the past [time period]

Development

1. industry or professional books read during the past [time period]
2. developmental audio or video tapes listened to or viewed during the past [time period]
3. classes or seminars read during the past [time period]

Additional contribution

1. product or service ideas submitted during the past [time period]
2. improvements suggestions (solutions) made during the past [time period]
3. company activities participated in outside the sales role during the past [time period] (e.g. training others, strategy sessions, writing an internal newsletter, etc.)

General overview (given above data points)

1. areas of strength over the past [time period]
2. areas of significant improvement over the past [time period]
3. areas needing improvement in the coming [time period]

Suggested action steps

1. specific result focus for the coming [time period]
2. specific activity focus for the coming [time period]
3. specific development activities for the coming [time period]
4. other specific activities or areas for the coming [time period]

* If you're formally evaluating a member of your sales team, either introduce or conclude (whichever you prefer) each area of evaluation above with appropriate overview statements that address and identify…

particular strengths in that area
specific areas of significant improvement over the previous time period
specific areas where improvement is needed

… or include these statements toward the end of the evaluation, just before your suggested action steps for the coming time period.

Where there is no specific strength, improvement or improvement needed, avoid forcing verbiage and move on.