

	Current Year	Last Year
Client referral (solicited)		
Client referral (unsolicited)		
COI referral		
Networking event		
Networking group		
Networking association		
Cause/ board of directors		
Webinar		
Speaking engagement		
Company sponsored event		
Phone prospecting		
Foot canvassing		
Email campaign		
Letter campaign		
Marketing Efforts		
Lead generators		
Distributors		
Channels		
LinkedIn		
Facebook/ Twitter		

CURRENT GOALS/ PRIORITIES/ INITIATIVES

SHORT TERM GOALS	
LONG TERM GOALS	

COMPANY INFORMATION

COMPETITIVE INFORMATION

TOP 3 COMPETITORS	COMPETITIVE ADVANTAGES	COMPETITIVE DISADVANTAGES

TOP REASONS CUSTOMERS BUY

TEAM PERFORMANCE SATISFACTION

SALES TEAM ATTRIBUTES

STRENGTHS	AREAS OR OPPORTUNITY

RATING	VERY GOOD	GOOD	NEEDS IMPROVEMENT	N/A
General Skills				
Time Management				
Territory Management				
Organizational Skills				
Handle Details Well				
CRM Use				
Communication/ People Skills				
Verbal skills				
Writing Emails				
Listening Skills				
Handle Conflict				
Problem Solving				
Ability to Negotiate				
Internally				
With prospect/clients				
Relationship building				
Networking				
Activity Levels				
Net New Prospects Appointments				
Client Appointments				
Networking Appointments				
Proposals/ Demos/ Presentations				
Networking events/ groups/ associations				
Goals & Achievements				
Set Goals				
Written Goals				
Achieve Goals				
Performance Levels				

Utilizing Strategic Plan				
Attitude & Motivation				
Works to Potential				
Positive Attitude				
Enjoys Work				
Motivation level				
Resilient				
Self-development efforts				
Level of commitment				
RATING	VERY GOOD	GOOD	NEEDS IMPROVEMENT	N/A
Prospecting				
Prospecting Plan				
Prospect consistently				
Get through gatekeeper				
Utilize benefit statements				
Reference other clients				
Handle objections				
Close for the appointment				
Sales Process				
Run effective first appointment				
Build business rapport				
Confirm time				
Set expectations and agenda				
Uncover decision maker(s)				
Uncover decision making process				
Uncover alternatives being considered				
Uncover decision making criteria				
Uncover decision making timeline				
Uncover must have or like to have				
Uncover prospect's hot buttons				
Trial close				
Plant seeds/ traps for competition				
Presentation skills				
Handling objections				
Negotiating skills				
Closing skills				
Networking Skills				
Asking for referrals				

Strong circles of influence				
Give referrals consistently				
Viewed as well networked				
Get referrals consistently				
LinkedIn				
Use LinkedIn regularly				
LinkedIn recommendations				
LinkedIn connections				
Generated business from LinkedIn				
Sales Performance				
Satisfaction with revenue levels				
Pipeline level				
# Sales associates with adequate pipelines				