



SALES

PERFORMANCE

REVIEW





WELCOME TO

CREWMOJO

Enabling performance experiences to be designed and delivered in days not months.

Use these templates for inspiration or as a starting point for your own system. When you need to automate and scale the process, each template is ready to go in the Crewmojo platform.

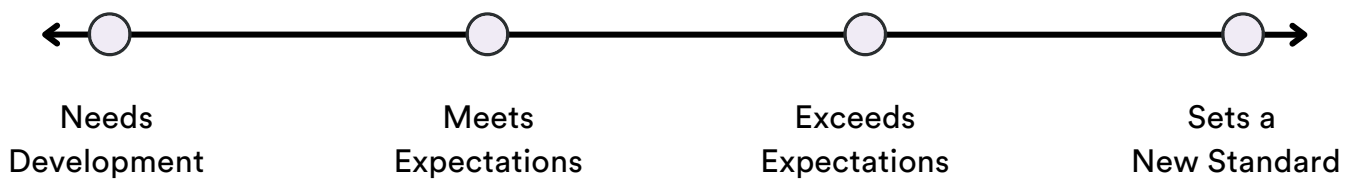
Take a [personal tour](#) of Crewmojo.

PERFORMANCE REVIEW - SALES

This sales rep review is focused on the soft skills of the role including the disciplines of CRM usage, time management and discover skills - all considered important elements of a successful sales rep.

Time Management Skills

Punctuality, daily planning, daily review, uses tools to manage time



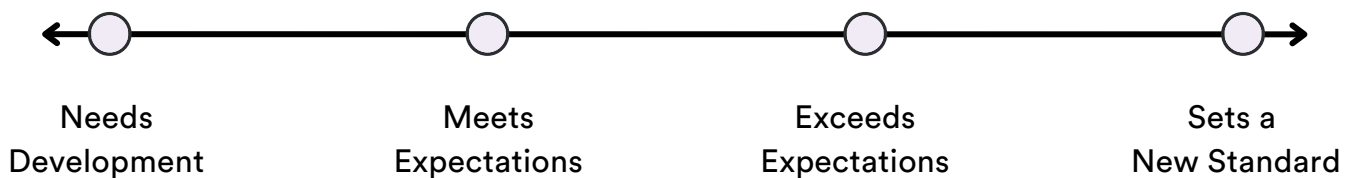
Attention to Detail and Process

Active listening on calls takes notes, great summary emails, firm future commitment, includes agenda



Motivation Level and Drive

Attitude, team play, calls reviewed, participation in training



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Communication Skills- Written

Excellent email summaries, keeps good notes in CRM, uses prospects words back to them.



Communications Skills - Verbal

Focuses on positive, listens more than they talk on calls, restates, reframes, validates, stands on calls for improved tone, confident & assertive.



Pipeline Development

Spends extra time prospecting, develops partnerships, generates client referrals, copies the best reps, develops social media expertise



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Forecasting Accuracy

Focuses on identifying and/co creating compelling events, logs progress of every deal in CRM, asks about prospects calendar of events, resists urge to predict future.



Consistent Application of CRM & Internal Process

Knows our deal stages, uses our CRM as instructed, adheres to milestones/outcomes required to move stage, adds exact notes on each deal.



Understanding of Target Profile

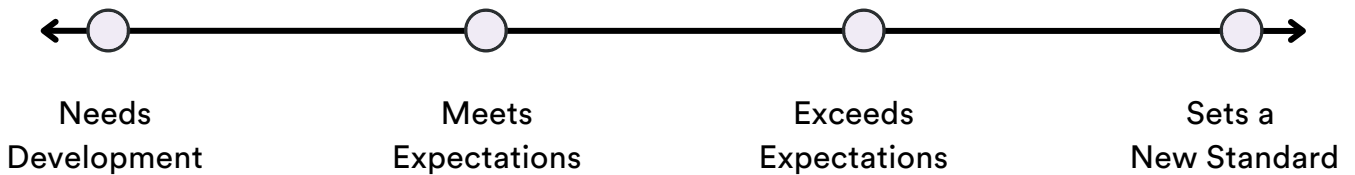
Knows target persona profiles inside out, knows top challenges & initiatives, speaks with authority about industry & people, process & systems, not product.



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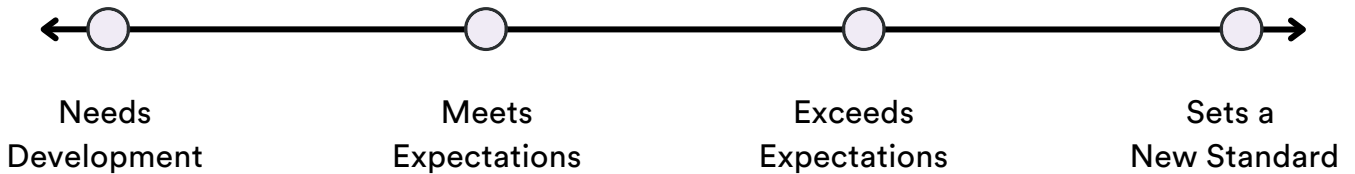
Rep Creates and Follows a Close Plan

Writes a step-by-step close plan, uses close plan on all calls past discovery



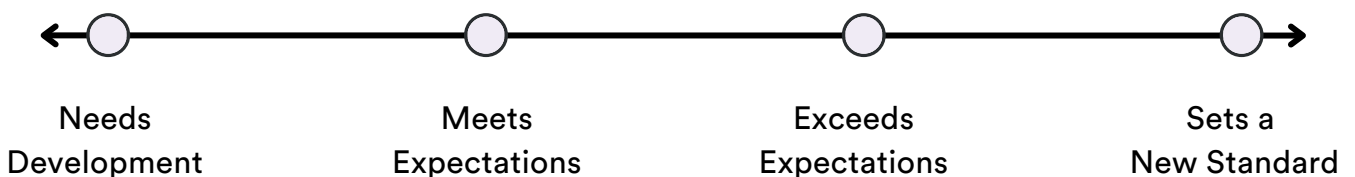
Discovery Skills

Conducts a solid current state vs. future state analysis and get prospect to discovery where the holes are in their plan.



Ability to Overcome Objections

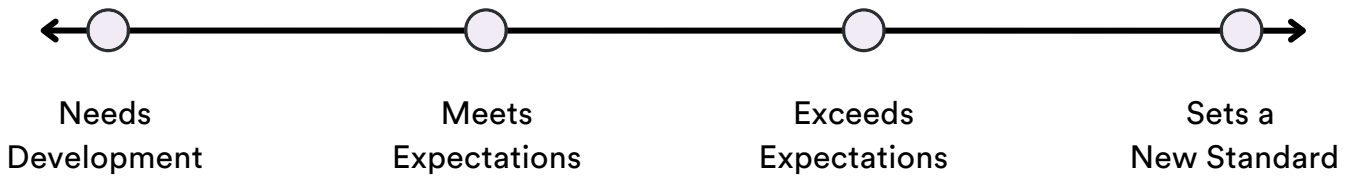
Uses a library of give/gets and trades access to power for demo/pricing, pitches when it's time



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Planning and Follow-up

Researches client before any call, sends pre-call appt confirmation and always sends post-call email summary in client's own words, follows template and records in CRM





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Building a world-class performance culture is made easy with our template library and pre-designed employee experiences.

Templates:

- One-on-one templates
- Performance review templates
- Role descriptions
- Goal templates
- Survey templates
- Engagement surveys
- and more

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- Onboarding new employees
- Goal setting & alignment
- Growth plans & coaching
- Skill tracking & development
- Feedback & recognition
- Stay interviews
- Performance reviews
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