



Sm Marketing Institute

The Sm Marketing CONNECT Learning Center



Sales Rep Evaluation – Ride Along

General Information	
Employee Name:	Employee Title:
Manager's Name:	Manager's Title:

Product Knowledge	Poor	Fair To Average	Good	Excellent
Presentation	Poor	Fair To Average	Good	Excellent
Preparation for Calls	Poor	Fair To Average	Good	Excellent
Knowledge of Customer's Needs	Poor	Fair To Average	Good	Excellent
Personal Rapport with Customer	Poor	Fair To Average	Good	Excellent
Questioning Technique	Poor	Fair To Average	Good	Excellent
Reporting	Poor	Fair To Average	Good	Excellent
Appearance	Poor	Fair To Average	Good	Excellent
Closing Skills	Poor	Fair To Average	Good	Excellent
Attitude	Poor	Fair To Average	Good	Excellent
Overall Performance	Poor	Fair To Average	Good	Excellent

Department/Program	Date of Ride Along:
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Performance Scale
Comments on Goal for the Day

Evaluation and Recommendations

Primary areas needing improvement:

- Documenting and annotating CRM after each activity or visit
- Documenting more consistently, Decision Maker & remembering to obtain email address where applicable
- Consistently remembering to use all literature provided to rep for distribution to prospects
- Consistently remember to have sales materials stored in an organized manner
- Other _____

Certification
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%; border-top: 1px solid black; text-align: center;">Employee's Signature</div> <div style="width: 45%; border-top: 1px solid black; text-align: center;">Manager's Signature</div> </div>



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A Sales Rep Evaluation helps you determine which salespeople are performing above or below your standards. This information is not only valuable from a reward perspective, but it can also be used to make sure your quotas are accurate or understand where you need to focus your attention for training and/or coaching opportunities. This is an example of a basic evaluation but don't be afraid to amend it to your specific needs.

Do you have questions or need help with this tool? Send us an email at info@smmarketingconnect.com. We are happy to answer your questions!