



Smarketing Institute

Sales and Marketing Resource for Small Business



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="border-top: 1px solid black; margin-top: 5px; width: 80%;"></div>	<div style="border-top: 1px solid black; margin-top: 5px; width: 80%;"></div>
Employee’s Signature	Manager’s Signature