

# Sample Performance Evaluation Form Template—[e.g., Inside Sales]

This sample is designed to show a typical format for a performance evaluation form and is not designed to represent a specific job. All performance evaluation forms should be customized to be compatible with the job description you have developed. As shown below, forms should include an explanation of the scale used for evaluation.

The **three-point scale** (Exceeds Expectations, Meets Expectations and Fails to Meet Expectations) is used in this sample Performance Evaluation Form Template.

***The three performance indicators used to define each performance level are:***

## **1 Exceeds**

Performs beyond requirements of the objective. Work performance is consistently effective. There are no weaknesses in performing the major areas of responsibility.

***Some examples of work behavior typical of this level of performance are:***

- Accomplishments exceed what is expected of an individual
- Each project or job is done thoroughly and on time
- Employee continually provides “extras”
- Employee requires practically no direction and supervision
- Employee thinks beyond details of the job, works toward the overall objectives of the organization
- Personal commitment to a high level of performance and results is evident

## **2 Meets**

Work performance is what is expected of a fully qualified and experienced person in the position or an employee who is learning the responsibilities of a new position. Major areas of responsibility are performed in an acceptable manner.

***Some examples of work behavior typical of this level of performance are:***

- Errors are minimal and seldom repeated
- Employee prioritizes problems well
- Employee requires only normal supervision and follow-up
- Employee completes work or projects on schedule
- A reasonable balance between quality and quantity is demonstrated

### **3 Fails to Meet**

Work performance consistently fails to meet the requirements of the objective. Work performance on most major areas of responsibility are inadequate. Employee has been on the job long enough to show better performance.

***Some examples of work behavior typical of this level of performance are:***

- Despite repeated explanations, employee does not grasp requested or required tasks
- Employee requires close guidance
- Work assignments are completed dependably only with constant follow up

# HOW TO USE THE PERFORMANCE EVALUATION FORM TEMPLATE (using Inside Sales as an example)

**Performance Evaluation Form—**  
**Enter Job Title Here, e.g. Inside Sales**

| Performance Objectives:   | Performance Review  |
|---|---|
| <p><b>Enter Job title here (e.g., Inside Sales Rep)</b></p>   |   |
| <p><b>List First Objective/Duty Here</b><br/> <b>(e.g., increase sales and gross margin returns—</b><br/> <b>develop objectives from job description for the</b><br/> <b>inside sales)</b></p> <p><b>Record measurable sale- related result areas here</b><br/> <b>e.g.,:</b></p> <ul style="list-style-type: none"> <li>▪ <i>Generates new and repeat sales; achieves sales goals and margins</i></li> <li>▪ <i>Increases sales and average order size by means of cross-selling, up selling, add-on sales and offering promotional sale item</i></li> <li>▪ <i>Presents prices, credit and terms in accordance with standard procedures and customers’ profitability profiles</i></li> <li>▪ <i>Determines customer requirements and expectations in order to recommend specific products and solutions</i></li> <li>▪ <i>Accurately processes customer transactions such as orders, quotes or returns</i></li> <li>▪ <i>Other</i></li> </ul> | <p><b>Comments:</b></p> <p><i>Reviewer enters comments here.</i></p> <p><i>Comment here on the extent to which sales and margin targets have been achieved, excess discounts avoided etc.</i></p> <p><i>Comment on new customers achieved improvements or decline in average order size</i></p> <p><i>Comment on how well pricing and service policies have been followed</i></p> <p><i>Comment on accuracy/errors in order processing</i></p> <p><i>Comment on any special achievements or assignments in the sales area.</i></p> <p><b>Rating (check one):</b></p> <p><input type="checkbox"/> <b>Exceeds</b></p> <p><input type="checkbox"/> <b>Meets</b></p> <p><input type="checkbox"/> <b>Fails to Meet</b></p> |

|   |  |
|---|--|
| <p><b>List second major responsibility area<br/>(e.g., Inside Sales Support)</b></p> <ul style="list-style-type: none"> <li>▪ <i>Provides product and technical information in a timely manner</i></li> <li>▪ <i>Resolves customer complaints quickly</i></li> <li>▪ <i>Monitors scheduled shipment dates to ensure timely delivery and expedite as needed</i></li> <li>▪ <i>Fills requests for catalogs, information and samples in a timely manner</i></li> <li>▪ <i>Other</i></li> </ul> | <p><b>Comments:</b></p> <p><i>Reviewer enters comments here.</i></p> <p><i>Comment on accuracy and timeliness of delivery per company policy, previous periods or other performers</i></p> <p><i>Comment on responsiveness to customer complaints and requests for information from internal and external customers</i></p> <p><b>Rating (check one):</b></p> <p><input type="checkbox"/> <b>Exceeds</b></p> <p><input type="checkbox"/> <b>Meets</b></p> <p><input type="checkbox"/> <b>Fails to Meet</b></p> |
| <p><b>List third major responsibility area<br/>(e.g., Inside Sales-Order Processing)</b></p> <ul style="list-style-type: none"> <li>▪ <i>Effectively prioritizes customer orders, quotes and returns</i></li> <li>▪ <i>Researches cost and availability as requested</i></li> <li>▪ <i>Accurately verifies customer credit</i></li> </ul>   | <p><b>Comments:</b></p> <p><i>Reviewer enters comments here.</i></p> <p><i>Comment on timeliness and accuracy of information provided.</i></p> <p><i>Comment on adherence to corporate credit policies.</i></p> <p><b>Rating (check one):</b></p> <p><input type="checkbox"/> <b>Exceeds</b></p> <p><input type="checkbox"/> <b>Meets</b></p> <p><input type="checkbox"/> <b>Fails to Meet</b></p>   |

|  |   |
|--|---|
| <p><b>List fourth major responsibility area (e.g, Inside Sales-Marketing)</b></p> <ul style="list-style-type: none"> <li>▪ <i>Analyzes competitors' strengths and weaknesses and recommends effective counter strategies</i></li> <li>▪ <i>Recommends sales potential for new customers</i></li> <li>▪ <i>Update customers about terminology, features and benefits of products in order to improve product-related sales and customer satisfaction</i></li> <li>▪ <i>Other</i></li> </ul> | <p><b>Comments:</b></p> <p><i>Reviewer enters comments here.</i></p> <p><i>Comment on how well individual serves external customers</i></p> <p><b>Rating (check one):</b></p> <p><input type="checkbox"/> <b>Exceeds</b></p> <p><input type="checkbox"/> <b>Meets</b></p> <p><input type="checkbox"/> <b>Fails to Meet</b></p>  |
| <p><b>List fifth major responsibility area (e.g, Inside Sales-Teamwork)</b></p> <ul style="list-style-type: none"> <li>▪ <i>Communicates well with inside and field sales representatives and management to manage accounts</i></li> <li>▪ <i>Accepts, supports and works with decisions of others</i></li> <li>▪ <i>Demonstrates ability to build relationships internally and outside organizations</i></li> <li>▪ <i>Other</i></li> </ul>   | <p><b>Comments:</b></p> <p><i>Reviewer enters comments here.</i></p> <p><i>Comment on how well individual serves and accepts help from internal customers to better serve customers</i></p> <p><i>Discuss how well person represents the company</i></p> <p><b>Rating (check one):</b></p> <p><input type="checkbox"/> <b>Exceeds</b></p> <p><input type="checkbox"/> <b>Meets</b></p> <p><input type="checkbox"/> <b>Fails to Meet</b></p> |

|   |   |
|---|---|
| <b>Other</b> _____ :  | <b>Comments:</b><br><br><b>Rating (check one):</b><br><input type="checkbox"/> <b>Exceeds</b><br><input type="checkbox"/> <b>Meets</b><br><input type="checkbox"/> <b>Fails to Meet</b> |
| <b>Other Major Accomplishments:</b><br><br>List any major achievements, contributions or areas where performance exceeded expectations  |   |
| <b>Summary of Employee's Strengths:</b><br><br>Provide overall review of employee's strongest attributes  |   |
| <b>Summary of Employee's Areas Where Development is Needed:</b><br><br>Clarify actions to improve performance<br>List skills to be acquired or strengthened, and training to be completed |   |
| <b>Overall Performance Rating (check one):</b><br><br><input type="checkbox"/> <b>Exceeds</b><br><input type="checkbox"/> <b>Meets</b><br><input type="checkbox"/> <b>Fails to Meet</b>   |   |

**Employee Comments**

The employee provides his/her opinion concerning overall performance and content of the evaluation

**Signature:**

Supervisor

Date

Next Level Management

Date

My signature indicates this review has been discussed with me and I have been given the opportunity to comment in writing on this review.

Employee

Date