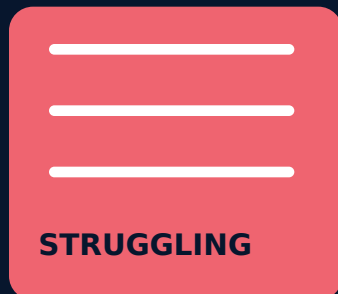
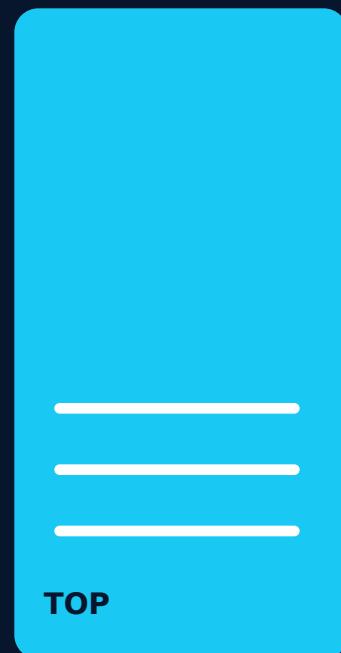


THE SALES REP PERFORMANCE SCORECARD

TOP PRODUCER. MIDDLE OF THE PACK. STRUGGLING.
WHERE DO YOU REALLY STAND?



12 BEHAVIORS / 60 POINTS / ONE 30-DAY PLAN

01 / THE ASSESSMENT

Score what you actually do

Use your last 10 relevant sales opportunities, not your best day or intentions.

1 = Rarely 2 = Occasionally 3 = Half the time
4 = Most of the time 5 = Consistently

01 PREPARATION

I prepare for the conversation with a clear objective.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

02 OPENING

I establish an agenda and a clear purpose.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

03 DISCOVERY

I uncover the real problem beyond the first answer.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

04 DISCOVERY

I establish the impact and reason to act.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

05 LISTENING

I listen, clarify, and confirm before responding.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

06 RECOMMENDATION

I connect my recommendation to stated priorities.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

07 VALUE

I explain outcomes rather than listing features.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

08 OBJECTIONS

I diagnose the concern before answering it.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

09 CLOSING

I ask for a decision or a specific next step.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

10 FOLLOW-UP

I follow through on every agreed commitment.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

11 ORGANIZATION

I record accurate notes and next actions.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

12 COACHABILITY

I review calls and apply feedback regularly.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

TOTAL EXECUTION SCORE: _____ / 60

02 / YOUR RESULTS

Your score is a starting point

This measures reported execution habits, not your production rank.

48-60

ADVANCED EXECUTION

Strong habits. Focus on consistency and refinement.

36-47

DEVELOPING EXECUTION

Good foundation. One or two gaps may limit results.

12-35

PRIORITY IMPROVEMENT

Build reliable fundamentals before adding complexity.

YOUR PRODUCTION SNAPSHOT / LAST 30 DAYS

Qualified opportunities: _____

Closed sales: _____

Close rate: _____ %

Revenue / units: _____

Close rate = closed sales ÷ qualified opportunities × 100

03 / THE IMPROVEMENT PLAYBOOK

Improve your lowest score first

Choose ONE priority behavior. Practice it repeatedly. Measure what changes.

DISCOVERY

Ask what caused the problem, its impact, and why now.

MEASURE: Review 2 calls / week for depth of questioning.

PRESENTATION

Tie each recommendation to a confirmed customer priority.

MEASURE: Audit 5 pitches for a clear problem-to-solution link.

OBJECTIONS

Clarify the actual concern before defending the offer.

MEASURE: Log objections and review your first response.

CLOSING

Define the decision and ask for an agreed next action.

MEASURE: Track qualified calls with a specific next step.

FOLLOW-UP

Set an owner, action, and date for every open opportunity.

MEASURE: Review overdue commitments twice weekly.

PREPARATION

Set a call objective and review relevant account context.

MEASURE: Use a 2-minute pre-call checklist for 10 calls.

MY LOWEST-SCORING BEHAVIOR:

ONE CHANGE I WILL PRACTICE:

04 / MANAGER + REP CALIBRATION

Two perspectives. One plan.

Compare scores against observed calls and actual results, not impressions.

REP SELF-SCORE

_____ / 60

MANAGER SCORE

_____ / 60

GAP 1

Behavior: _____

Evidence from calls / CRM: _____

GAP 2

Behavior: _____

Evidence from calls / CRM: _____

GAP 3

Behavior: _____

Evidence from calls / CRM: _____

COACHING AGREEMENT

One behavior to improve: _____

Practice / role-play commitment: _____

Manager support / feedback: _____

Success evidence: _____

Review date: _____

Score the behavior. Verify the evidence. Coach the gap.

05 / 30-DAY CHALLENGE

Turn the score into progress

Re-score after 30 days using a new set of 10 relevant opportunities.

WEEK 1 / BASELINE

Review calls; identify your lowest behavior score.

☐

WEEK 2 / PRACTICE

Role-play the behavior; use it on live conversations.

☐

WEEK 3 / REINFORCE

Review two calls; adjust and repeat.

☐

WEEK 4 / VERIFY

Re-score; compare execution and actual outcomes.

☐

START SCORE ____ / 60

DAY 30 SCORE ____ / 60

ONE BEHAVIOR THAT IMPROVED: _____

MANAGING A SALES TEAM? BOOK YOUR FREE REVENUE LEAK AUDIT