**ANNUAL REVIEW TEMPLATE – AREA SALES MANAGER**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Employee Name** |  |  | **Manager’s Name** |  |
| **Job Title** |  |  | **Job Title** |  |
| **Start Date** |  |  | **Date of meeting** |  |
| **Time in this role** |  |  | **Review period** |  |

**Role description:**

* Cover a defined territory, regularly visiting existing and future customers' sites in order to achieve sales targets.
* Be a strong ambassador for the company in order to build reputation and trust. Provide excellent customer service.
* Achieve targets for customer numbers, visits, sales turnover and margin.
* Complete a weekly report that documents territory activities, achievement, priorities, opportunities and challenges.
* Share insights from your territory with team members and management.
* Attend sales meetings, events and trade shows as required.

**Core competencies required:**

|  |  |
| --- | --- |
| **Competence** | **Evidenced by** |
| **Attitude**  | Takes responsibility. Doesn't blame others. Positive outlook. Has integrity. |
| **Persuasive** | Wins new business. Sells in promotions. Achieves new listings. Overcomes objections. |
| **Ability to build rapport** | Well-liked by colleagues and customers? Customer retention. Customer feedback. |
| **Self motivation** | Number of customers. Continuous sales improvement. Eager to learn. Volunteers for new experiences. Achieves activity targets. |
| **Listening** | Understanding of customers’ needs. Responds to training. Self-improvement |
| **Administration**  | Good use of IT. Completes reports fully and on time.  |
| **Time management**  | Stays ahead of target. Reports delivered on time. Makes time for prospecting. |
| **Self Planning** | Miles driven per customer visit. Average order value. Re-plans when behind target. |
| **Verbal and written communication** | Contribution to sales meetings, sales accompaniments, quality of reports. |
| **Achieves targets** | Understands what to achieve in every call. Re-plans if behind. On top of the numbers. |
| **Negotiation**  | Protects margin. Finds a win win solution. |
| **Customer numbers** | Maintains and grows targeted stockist numbers |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Employee Name** |  |  | **Manager’s Name** |  |
| **Job Title** |  |  | **Job Title** |  |
| **Start Date** |  |  | **Date of meeting** |  |
| **Time in this role** |  |  | **Review period** |  |

**Brought forward actions**

|  |
| --- |
| **What were your goals in this period?** |
|  |

|  |
| --- |
| **What have you achieved?** |
|  |

|  |  |  |
| --- | --- | --- |
| **Performance Review Template** | 2 | A long way below expectation |
|  | 4 | A little below expectation |
|  | 6 | Meeting expectation |
|  |  | 8 | A little above expectation |
| **Key Performance Indicators** |  | 10 | A long way above expectation |

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | **Employee Score** | **Manager Score** |
| **Personal** |  | 2 | 4 | 6 | 8 | 10 | 2 | 4 | 6 | 8 | 10 |
| Attitude  |  |  |  |
| Persuasive |  |  |  |
| Self motivation  |  |  |  |
| Ability to build rapport |  |  |  |
| Listening |  |  |  |
|  |  |  |  |
| **Professional** |  |  |  |
| Administration |  |  |  |
| Time management |  |  |  |
| Self planning |  |  |  |
| Verbal and written communication |  |  |  |
|  |  |  |  |
| **Financial** |  |  |  |
| Achieves targets (sales) |  |  |  |
| Negotiation (margin) |  |  |  |
| Customer numbers |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Employee Name** |  |  | **Manager’s Name** |  |
| **Job Title** |  |  | **Job Title** |  |
| **Start Date** |  |  | **Date of meeting** |  |
| **Time in this role** |  |  | **Review period** |  |

Line manager to document any feedback and agreed actions in each area.

|  |  |  |
| --- | --- | --- |
|  |  | **Notes / Comments / Required Actions** |
| **Personal** |  |  |
| Attitude  |  |  |
| Persuasive |  |  |
| Self motivation  |  |  |
| Ability to build rapport |  |  |
| Listening |  |  |
|  |  |  |
| **Professional** |  |  |
| Administration |  |  |
| Time management |  |  |
| Self planning |  |  |
| Verbal and written communication |  |  |
|  |  |  |
| **Financial** |  |  |
| Achieves targets (sales) |  |  |
| Negotiation (margin) |  |  |
| Customer numbers |  |  |