**XYZ Company Field Sales Evaluation Form**

Manager:­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Sales Representative:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Today’s Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of last field evaluation:\_\_\_\_\_\_\_\_\_\_ Work location:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Fieldwork Goals – consider last field evaluation

*This is completed prior to the visit!*

Targeted Accounts – not to include routine calls on current satisfied customers – *Selected prior to the manager’ visit*

|  |  |  |  |
| --- | --- | --- | --- |
| Account Name | Decision Maker | Goal | Results |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Other Accounts Seen

|  |  |  |  |
| --- | --- | --- | --- |
| Account Name | Decision Maker | Goal | Results |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

What went right?

|  |  |
| --- | --- |
| What needs improvement? | Action items |
|  |  |
|  |  |
|  |  |
|  |  |

Manager’s signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Sales Rep signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_