



SALES REPRESENTATIVE RESPONSIBILITY/ ACTIVITY CHECK-OFF



	CRISIS	DEFICIENT	GOOD	EXCELLENT
EQUIPMENT & INVENTORY MAINTENANCE				
Regularly checks systems for proper operation	()	()	()	()
Properly signs out inventory	()	()	()	()
Provides equipment care and protection	()	()	()	()
Provides adequate lead-time for products needed	()	()	()	()
ORDER HANDLING & PROCESSING				
Legible, prompt, complete	()	()	()	()
PLANNING				
Consistent with written activity plans	()	()	()	()
Keeps manager copied in and updated	()	()	()	()
TERRITORY MARKETING ACTIVITIES				
Uses direct mail	()	()	()	()
Frequency of phone use for setting appointments	()	()	()	()
CUSTOMER SERVICE & SUPPORT				
Follows through with proper equipment installation	()	()	()	()
Regular contact for customer follow-ups	()	()	()	()
Provides collection cooperation as needed	()	()	()	()
Handles customer complaints quickly & efficiently	()	()	()	()
Works effectively with service personnel	()	()	()	()
Gets leads for co-salespeople	()	()	()	()
Makes customer aware of new products	()	()	()	()
Instructs customers on all features of systems sold	()	()	()	()
PERSONAL				
Maintains businesslike behavior & appearance	()	()	()	()
Uses tapes/books/seminars to improve techniques	()	()	()	()
PROSPECTING				
Makes adequate amount of new sales calls	()	()	()	()
Effective at seeing the decision-maker	()	()	()	()
Keeps timely & adequate prospecting records	()	()	()	()
Updates manager on sales activities as required	()	()	()	()
ANALYZING NEEDS				
Determines situations, problems, implications, needs	()	()	()	()
Is alert to prosp./cust. equipment costs, capabilities	()	()	()	()
DEMONSTRATING AND PRESENTING				
Makes effective professional demonstration	()	()	()	()
Has facts on strong/weak points of competitors	()	()	()	()
Has workable product knowledge of equipment	()	()	()	()
Prepares effective sales proposals as required	()	()	()	()



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HANDLING OBJECTIONS/CLOSINGS

Effective at handling objections/stalls/closes	()	()	()	()
Quickly calculates equipment acquisition options	()	()	()	()

GENERAL SALES ACTIVITIES

Prompt attendance of sales meetings	()	()	()	()
Reads and makes effective use of bulletins	()	()	()	()
Follows company policy & management directives	()	()	()	()
Is supportive of coworkers; is a team player	()	()	()	()
Understands compensation plans & strategies	()	()	()	()