

## Bi-Annual Review: Sales Self Appraisal

| Part (i) - Profile   |  |                  |  |
|----------------------|--|------------------|--|
| Name:                |  |                  |  |
| Role:                |  | Start date:      |  |
| Department:          |  | Role start date: |  |
| Date of next review: |  |                  |  |

**Select 'Yes' or 'No' for each of the statements below:**

|   |     |    |
|---|-----|----|
| Do you have an up-to-date job description?  | Yes | No |
| Are you aware of the goals you set for the previous 6 months?   | Yes | No |
| Do you understand all the requirements of your job?   | Yes | No |
| Do you have regular opportunities to discuss your work, and action plans?   | Yes | No |
| Have you had a formal review in the last 12 months?   | Yes | No |
| If you answered yes to the above, have you carried out the improvements agreed with your manager which were made at the last appropriate meeting? | Yes | No |

| Part (ii)- Performance Review   |
|---|
| Overall how have you performed in the last 6 months? How have you performed against your KPI's? How have you performed against the goals you set? What are your areas of strength and weakness? |

| Key Performance Indicators (KPIs) |          |
|-----------------------------------|----------|
| KPI                               | Comments |
| CMPE                              |          |
| CR30                              |          |
| CR60                              |          |
| CR90                              |          |
| Sales Mistakes                    |          |
| 180 day customers                 |          |

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| Performance against half year goals  |
|--|
| Have you achieved the goals you previously set? How have you performed against these? If you didn't achieve these goals, why do you think that is? |
|  |

| Part (iii) - Feedback for Manager                                 |   |
|---|---|
| What support have you had from your manager that has worked well? | What else do you need from your manager / others? |
|   |   |

| Part (iv) - Goals for next 6 months  |
|--|
| What goals would you like to achieve in the next 6 months? What do you need to do to achieve them? |
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### Part (v) – Additional Comments

Please include any other comments below:

**Employee Signature:**

**Date:**

\*all data within this document will be treated as confidential