

Sales rep scorecard template

A sales rep scorecard template is a one-page monthly or quarterly record of one rep's performance: activity, pipeline created and progressed, results against quota, and skills rated against the competency framework, weighted into one score and ending in a single coaching focus, so the review explains why the numbers moved, not only whether they did.

Last updated 2026-10-26. Online version: <https://www.revsfire.io/resources/templates/sales-rep-scorecard-template>

How to use this template

1. **Set targets before the period starts:** Agree each measure's target at the start of the month or quarter. A target set after the results arrive becomes whatever the results were.
2. **Keep the measures few and the definitions fixed:** Three or four measures per section is enough. Write each definition once, with its CRM source, and keep it the same for every rep and every period so the scores compare.
3. **Rate skills on evidence from the period:** Use call scores, role-play scores, stakeholder maps and deal notes from the period, against the competency framework's behaviour anchors. A rating with no evidence beside it is an opinion.
4. **Read the sections in order:** Start with activity and move to outcomes. The first section where attainment drops is usually where the coaching focus is, even when the outcome miss is bigger.
5. **Agree one coaching focus, not five:** Pick the single skill or habit that would most change next period, write the practice plan and what the manager will do, and carry it into the coaching template.
6. **Compare the rep with their own last period:** The trend for one rep says more than a ranking against the team. Use team comparisons privately, to calibrate targets and ratings between managers.

The template

A header, four measured sections, a weighting block and a coaching focus, plus a variants block for SDRs, account executives and account managers. Attainment is actual divided by target, capped at 120 per cent so one great measure cannot hide a weak one; for measures where lower is better, divide target by actual. In the Excel version, fill in the Actual column and the attainment and section scores follow from it.

Scorecard header

Field	What to write	Your entry
Rep	Name, role (SDR, AE or account manager) and segment.	
Period	The month or quarter scored. Use the same period length for every rep on the team.	
Manager	Who fills in the scorecard and holds the review.	
Targets version	Which quota and activity targets apply, set at the start of the period, not after it.	
Data sources	CRM report names for activity, pipeline and outcomes; call and role-play scores for skills.	
Review date	When the manager and rep go through the scorecard together.	

Section 1: Activity

Measure	Definition	Target	Actual	Attainment	Notes
First meetings held	Meetings held with a contact at an account that fits the profile	[Number]	[]	[]	[]
Opportunities created	New opportunities that pass the qualification standard	[Number]	[]	[]	[]
Multi-threaded opportunities	Open opportunities with three or more buyer contacts engaged	[Number]	[]	[]	[]
Follow-up within one working day	Meetings followed up with a recap and next step within one working day	[Share of meetings]	[]	[]	[]

Section 2: Pipeline

Measure	Definition	Target	Actual	Attainment	Notes
Pipeline created	Value of qualified opportunities created in the period	[Value]	[]	[]	[]
Next-period coverage	Open pipeline due next period, divided by next period's quota	[Multiple, such as 3.0x]	[]	[]	[]

Stage progression	Opportunities moved a stage with the exit criteria recorded	[Number]	[]	[]	[]
Forecast accuracy	Commit at the start of the period compared with what closed	[Within a set range]	[]	[]	[]

Section 3: Outcomes

Measure	Definition	Target	Actual	Attainment	Notes
Bookings against quota	Closed-won value in the period, divided by quota	[Quota]	[]	[]	[]
Win rate	Closed-won divided by all opportunities closed (won and lost) in the period	[Rate]	[]	[]	[]
Average deal size	Closed-won value divided by the number of deals won	[Value]	[]	[]	[]
Sales cycle length	Days from opportunity created to closed-won; lower is better	[Days]	[]	[]	[]

Section 4: Skills and competency ratings

Competency	Evidence this period	Rating (1-4)	Last period	Comment
Discovery	Call scores, role-play scores, deal notes	[]	[]	[]
Value messaging	Call scores, demo recordings	[]	[]	[]
Objection handling	Call scores, scored objection role-plays	[]	[]	[]
Multithreading and deal strategy	Stakeholder maps, contacts engaged, deal reviews	[]	[]	[]
Negotiation	Discount requests, deal desk notes	[]	[]	[]
Forecasting and CRM discipline	Forecast accuracy, required fields, dated next steps	[]	[]	[]
Rating scale	1 developing, 2 approaching the standard, 3 meets the standard, 4 role model; use			

	the competency framework's behaviour anchors			
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Weighting and overall score

Field	What to write	Your entry
Section weights	Outcomes 40, pipeline 30, skills 20, activity 10 (adjust by role; see the variants block). Weights add up to 100.	
Section score	Activity, pipeline and outcomes: the average attainment of the section's measures. Skills: the average rating divided by 3, so meeting the standard on every competency scores 100.	
Overall score	The sum of each section score multiplied by its weight, divided by 100.	
Bands	110 and above: exceeding. 95 to 109: on target. 80 to 94: close the gap. Below 80: agree a written plan.	
Trend	This period's overall and section scores next to the last two periods.	

Coaching focus

Field	What to write	Your entry
Where the chain broke	The first section where attainment drops, reading from activity to outcomes.	
One focus	The single skill or habit to work on next period, chosen from the evidence above.	
Evidence	The measures and ratings that point to it.	
Practice plan	What the rep will practise and how often, such as one scored role-play a week.	
Manager commitment	What the manager will do: calls joined, recordings reviewed, deal reviews.	
Check at next review	The measure or rating that should move, and by how much.	

Variants: SDR, account executive, account manager

Section	SDR or BDR	Account executive	Account manager
Suggested weights	Activity 30, pipeline 40, outcomes 10, skills 20	Activity 10, pipeline 30, outcomes 40, skills 20	Activity 10, pipeline 25, outcomes 45, skills 20

Activity	Conversations held, meetings booked, sequences followed	First meetings, opportunities created, multi-threading	Business reviews held, executive contacts engaged
Pipeline	Meetings that became qualified opportunities	Pipeline created, coverage, stage progression	Expansion pipeline, renewals forecast on time
Outcomes	Pipeline from sourced meetings that closed	Bookings, win rate, deal size, cycle length	Net revenue retained, expansion bookings, renewals closed
Skills to rate	Opening, qualification, objection handling	Discovery, value messaging, multithreading, negotiation	Account planning, value realisation, negotiation

A worked example

Example: fictional company. Ferncastle Analytics sells revenue-forecasting software to mid-market sales teams. Martin Kell is an account executive in its UK team; Sofia Lund is his manager. This is his Q3 scorecard, using the account executive weights. All names and figures are invented for illustration and are not benchmarks.

Ferncastle Analytics: Q3 scorecard extract

Section (weight)	Measure	Target	Actual	Attainment
Activity (10)	First meetings held	24	31	120 (capped from 129)
Activity (10)	Multi-threaded opportunities	8	4	50
Pipeline (30)	Pipeline created (USD)	540,000	610,000	113
Pipeline (30)	Next-quarter coverage	3.0x	2.4x	80
Pipeline (30)	Stage progression	12	9	75
Outcomes (40)	Bookings against quota (USD)	180,000	153,000	85
Outcomes (40)	Win rate	25 per cent	22 per cent	88
Outcomes (40)	Average deal size (USD)	30,000	30,600	102

Skills ratings and section scores

Item	Result	Note
Skills ratings	Discovery 3, value messaging 3, objection handling 3, multithreading 2, negotiation 2, forecasting 3	Average 2.67, divided by 3: skills score 89
Section scores	Activity 85, pipeline 89, outcomes 92, skills 89	Averages of the attainments above, rounded
Overall score	$(85 \times 10 + 89 \times 30 + 92 \times 40 + 89 \times 20) / 100 = 89.8$, rounded to 90	Band: close the gap

Coaching focus agreed at the review

Field	Entry
Where the chain broke	Activity is strong on first meetings but only 4 of 8 opportunities reached a third contact; coverage and stage progression fell short after that.
One focus	Multithreading: reaching the economic buyer and one more stakeholder before the proposal stage.
Evidence	Multi-threaded opportunities at 50; multithreading rated 2; two Q3 losses went quiet after the champion left the conversation.
Practice plan	Stakeholder map for each open opportunity; one scored role-play a week asking a champion for access to the economic buyer.
Manager commitment	Sofia joins two first calls with economic buyers and reviews every stakeholder map at the fortnightly deal review.

Check at next review	Multi-threaded opportunities at 8 or more; multithreading rated 3; coverage back to 3.0x.
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Example: fictional company. Ferncastle Analytics, Harborview Metrics, Marlow & Finch Logistics and every person named in this example are invented for illustration. Any resemblance to real companies or people is coincidental.

Common mistakes

- **Only lagging measures:** A scorecard of bookings, win rate and deal size tells you the quarter was short, after it ended. Activity and pipeline measures show it coming.
- **Too many measures:** Twenty measures per rep take an hour to fill in and nobody coaches on all of them. Choose the few that explain results for this role.
- **Activity without quality:** Counting calls and emails rewards volume. Count activity that meets a standard, such as meetings with accounts that fit the profile.
- **Skills rated on feel:** Without behaviour anchors and evidence, two managers rate the same rep differently. Use the competency framework and the call and role-play scores from the period.
- **Using it as a leaderboard:** A public ranking teaches reps to manage the scorecard rather than the work. Share each rep's scorecard with that rep and their manager.
- **No coaching focus:** A scorecard that ends at the overall score is a report card. The review is only useful if it ends with one thing to change and the date it is checked.