

Sales skills assessment template

A sales skills assessment template is the instrument for scoring a sales team against a defined skill set in a set window: what to observe or test per skill, the evidence source, a 0-4 scale with anchors, the team skills matrix the scores roll into, and the action each gap turns into.

Last updated 2026-10-25. Online version: <https://www.revspire.io/resources/templates/sales-skills-assessment-template>

How to use this template

1. **Take the skills from the framework, not from a brainstorm:** If a competency framework exists for the role, the assessment's skill list is already written. If it does not, write the five or six skills as observable behaviours before scoring anyone, or two assessors will score two different things.
2. **Fix the evidence window and stay inside it:** Last quarter, stated up front. Evidence from a rep's famous call two years ago measures reputation. The window is also what makes the next assessment comparable to this one.
3. **Score from evidence the rep can see:** Every score cites the call, deal or role-play it came from, in the notes column. A rep who can inspect the evidence can argue with it, and an assessment reps can argue with is one they will accept.
4. **Use role-plays where live evidence is thin:** Some skills surface rarely: a rep might go a quarter without a real procurement standoff. A scored role-play of the missing scenario is better evidence than a guess, and it gives every rep the same test.
5. **Calibrate the two assessors before the debriefs:** Both assessors score independently, then compare before anyone meets a rep. Every cell they disagree on by two or more points is an instrument problem, not a rep problem; fix the row's wording.
6. **End with one gap per rep, not a development essay:** The priority-gap column holds one skill per rep, which becomes one coaching row with a practice target and a re-assess date. A rep handed four gaps works on none of them.

The template

Four blocks in sequence: set the assessment up, score each skill with evidence, roll the scores into the team matrix, and turn every priority gap into an action with a date.

Assessment setup

Field	What to write	Your entry
Role and cohort assessed	One role per assessment: an SDR instrument and an AE instrument are different documents.	

Skills in scope	Five or six, taken from the role's competency framework. More than that and the assessment gets completed once and abandoned.	
Evidence window	The period the evidence must come from, usually the last quarter. Older evidence tests memory, not skill.	
Assessors	Who scores, and who settles a disagreement. Two assessors per rep is the honest minimum for anything that feeds a decision.	
What the scores will be used for	Development, coaching priority, or hiring profile. Say it up front: an assessment that secretly feeds performance management stops getting honest evidence within one cycle.	

The scoring instrument: one row per skill, evidence required

Skill	What to observe or test	Evidence source	Score (0-4)	Notes for the debrief
Discovery	Does the rep uncover the cost of the current approach in the buyer's own numbers, unprompted?	Two recorded calls or deal notes from the window		
Objection handling	Does the rep separate the stated objection from the underlying concern, and resolve the concern?	One live or recorded objection sequence; role-play if no live example exists		
Closing and commitment	Does every late-stage conversation end with a named next step, an owner and a date?	Last three late-stage calls or deal notes		
Multi-threading	Can the rep name every role in the decision on their two biggest deals, and who is missing?	Deal review, checked against the CRM contacts		
Product narrative	Can the rep tell the story for a named segment without feature-listing?	Role-play with a scenario from a real deal		
Forecast hygiene	Do committed deals carry evidence a second person could check?	The rep's current forecast against the deal records		

Scoring anchors: every assessor uses these, not their instincts

Score	Meaning
0	Not observed, and no evidence the skill exists.
1	Does it when walked through it, or the evidence contradicts the claim.
2	Does it when prompted; inconsistent without supervision.
3	Does it unprompted, on real deals, in the evidence window.
4	Does it unprompted and could teach it; others already copy their approach.

The team skills matrix: the assessment's output

Rep	Discovery	Objection handling	Closing	Multi-threading	Product narrative	Priority gap
[Rep name]						[The one gap coaching tackles first]
[Rep name]						[The one gap coaching tackles first]
Team view	[Average]	[Average]	[Average]	[Average]	[Average]	[The skill the TEAM is shortest of]

From gap to action: one row per priority gap

Gap (rep and skill)	Practice assigned, with a live target	Checkpoint	Re-assess date
[Rep, skill]	[The rehearsal, and the named live conversation it prepares for]	[What the manager will look at, and when]	[Date]
[Rep, skill]	[The rehearsal, and the named live conversation it prepares for]	[What the manager will look at, and when]	[Date]

A worked example

Example: fictional company. Orbview Software sells a logistics analytics platform with six account executives. Sales manager Ruth Adeyemi ran the assessment over two weeks in October using call recordings, deal notes and one role-play per rep, with the enablement lead as second assessor.

Orbview Software: the matrix after the October cycle

Rep	Discovery	Objection handling	Closing	Multi-threading	Product narrative	Priority gap
Jonas Keller	3	2	2	3	4	Objection handling: answers the objection as stated
Sofia Marino	4	3	2	2	3	Closing: late-stage calls end without a dated next step
Dev Patel	2	2	3	3	4	Discovery: proposes before costing the current approach
Team view	3.0	2.3	2.3	2.7	3.7	Objection handling and closing, team-wide

What the matrix changed

Finding	The decision it produced
Product narrative averaged 3.7 while objection handling averaged 2.3	The planned product-refresher workshop was cancelled; the budget moved to objection-handling practice, which matches the pattern in Revspire's published role-play benchmark
Sofia scored 4 on discovery and 2 on closing	Her coaching row targets closing only; she also now reviews one discovery call a month for the two reps at 2
Every rep scored 2 or 3 on multi-threading with no 4 in the team	No internal teacher exists, so the gap went to the enablement lead to build role-plays rather than to peer coaching

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

- **Self-assessment as the only input:** Self-ratings measure confidence. Useful as a conversation starter, but a matrix built on them steers training toward whatever the team is modest about rather than weak at.

- **Scoring traits instead of skills:** "Driven" and "coachable" cannot be observed in a call or tested in a role-play, so they attract whatever score the assessor's general impression supplies. Every row must name something a recording could settle.
- **Assessing without consequence:** If the matrix does not change the coaching plan or the training budget, the second cycle gets completed carelessly and the third not at all. The gap-to-action block is the template's point, not an appendix.
- **One instrument for every role:** Closing for an SDR means a booked meeting with the right person; for an enterprise AE it means commitment against a paper process. Same word, different skill. One instrument per role.
- **Letting the assessment drift into performance review:** The moment scores feed ratings, evidence dries up: reps submit their best calls and hide the rest. Keep the assessment developmental, say so in the setup block, and keep the review process separate.
- **Measuring everything and fixing nothing:** Twelve skills scored to one decimal place is measurement theatre. Five skills, honest anchors and one acted-on gap per rep beats a beautiful spreadsheet nobody opens between cycles.