Job Task Performance Observation Form

Step 1: Business Opportunity Management

Job Task Being Observed: **Securing First Appointments**

Job Task Details to Look For:

* Calls only contacts at leads qualified in previous job task (commodity, good financial history, and at least minimum sales volume history/potential.)
* Uses research to identify a reason for contact to be interested in a sales visit (trade country update; existing relationship with contact company’s customer or supplier, etc.)
* Pursues or abandons sales lead based on Go/No Go decision making criteria.
* Fits first appointment into optimal “day of calls” planning.

# Performance Observation Details

Employee Name:

Date Observed:

Observation Notes:

Performance Rating:  (BP = Best Practice; SP = Standard Practice; DP = Developing Practice. DP ratings require Development Plan details below.)

# Skill Development Plan Details

Performance Goal:

Action:

To be started date:       To be completed date:

To be reviewed date:

Action Notes: