

Riley Thompson — Account Executive

MANAGER Alex Rivera	DEPARTMENT Sales	REVIEW DATE July 8, 2025	TENURE 1 yr 4 mo
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1 GOALS RECAP — H1

Close \$240k new business Actual: \$268k across 14 deals	EXCEEDED
Launch outbound playbook Documented, adopted by 3 AEs	MET
Mentor one SDR Partial — started in May, continues H2	IN PROGRESS

2 COMPETENCIES

COMPETENCY	SELF	MANAGER RATING (1–5)	FINAL
Discovery & needs analysis Asks sharp questions, maps pain to value	5		5.0
Pipeline management Clean CRM, accurate forecast calls	4		4.0
Negotiation Holds value, trades instead of discounting	3		4.0
Team contribution Shares plays, lifts the room	4		5.0
Product knowledge Feature depth and roadmap fluency	3		3.0

3 MANAGER NOTES

Riley's half was the strongest on the team — **112% of quota** with the cleanest discovery notes we've seen. The outbound playbook is now team standard. Growth edge: multi-threading enterprise deals earlier instead of late-stage scrambling. Riley rates their own negotiation a 3; the deal record says otherwise.

4 DEVELOPMENT PLAN — H2

- Enterprise deal workshop (Aug)
- Lead one QBR per month
- Shadow CS on two renewals
- Sandler negotiation module by Oct
- Target: Senior AE promotion case by Dec

5 GOALS — H2 2025

GOAL	HOW WE'LL MEASURE IT	DUE
Close \$310k new business	Closed-won ARR in Northwind CRM	Dec 31
Multi-thread every deal > \$40k	Three or more contacts engaged before proposal	From Aug 1
Finish the SDR mentorship	Sam Ortiz ramped to full quota, signed off by Alex	Nov 15

OVERALL RATING — H1 2025

Exceeds expectations

4.2 / 5

6 CALIBRATION

Reviewed July 2 in the sales leadership calibration session (A. Rivera, M. Chen, D. Whitfield). Rating held at **Exceeds expectations** against a distribution of 1 Outstanding / 3 Exceeds / 5 Meets. Product knowledge moved 3.5 → 3.0 to match the published band.

7 EMPLOYEE COMMENTS

Optional. Anything written here goes into the personnel file unedited, before signing.