

# Sales Progress Checks

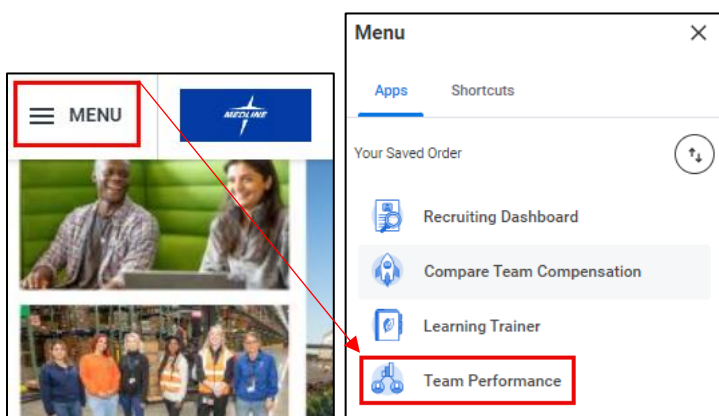
## Managers



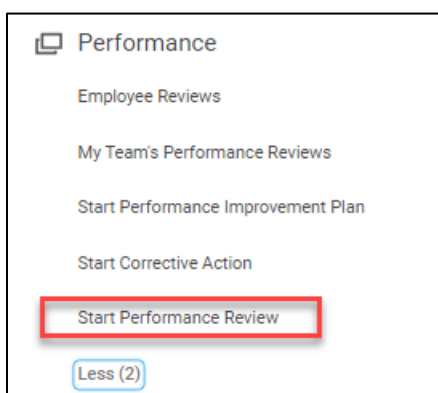
For Managers participating in sales progress checks, this guide will show you how to start and complete the sales progress check.

### Starting the sales progress check

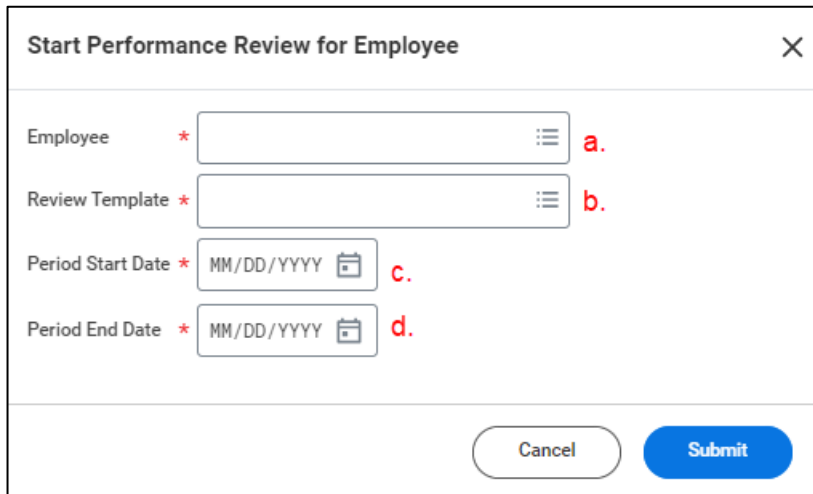
To get started, click on the **Menu** icon in the top left-hand corner of your Workday Homepage. Then, select the **Team Performance** application.



1. From the **Performance** menu on the right-hand side of the screen, select **Start Performance Review**.



2. Next, fill out the details of the performance review:



Start Performance Review for Employee

Employee \*  a.

Review Template \*  b.

Period Start Date \* MM/DD/YYYY c.

Period End Date \* MM/DD/YYYY d.

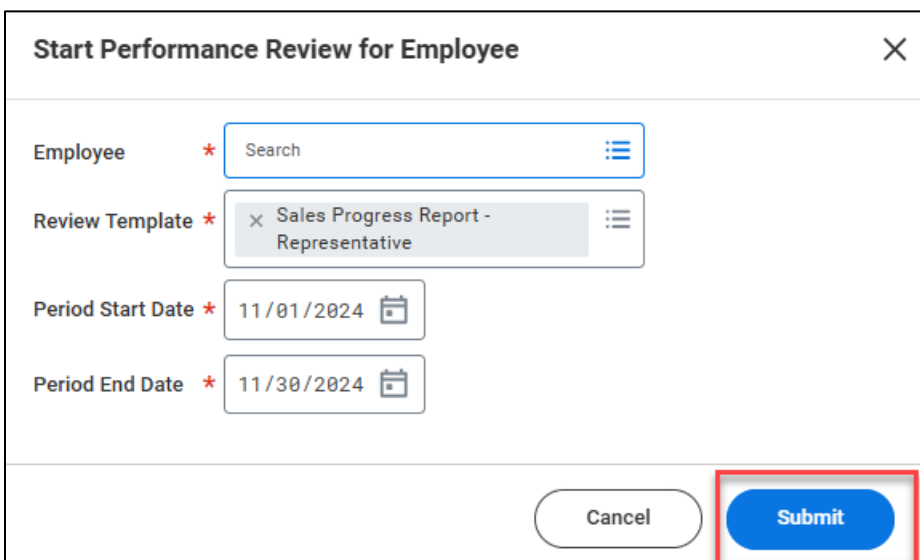
Cancel Submit

- a. Enter the name of the **Employee** who is receiving the mid-year review.
- b. From the **Review Template** drop-down menu, select **Sales Progress Check**. Select type of Sales Progress Check: **Sales Progress Report – Representative** or **Sales Progress Report – Spec**.
- c. Enter the **Period Start Date**.
- d. Enter the **Period End Date**.



Please note that time periods for reviews must be unique. You cannot have multiple reviews open for the same employees with overlapping time periods.

3. Click **Submit** when you have entered all the details for the performance review.



Start Performance Review for Employee

Employee \* Search

Review Template \* Sales Progress Report - Representative

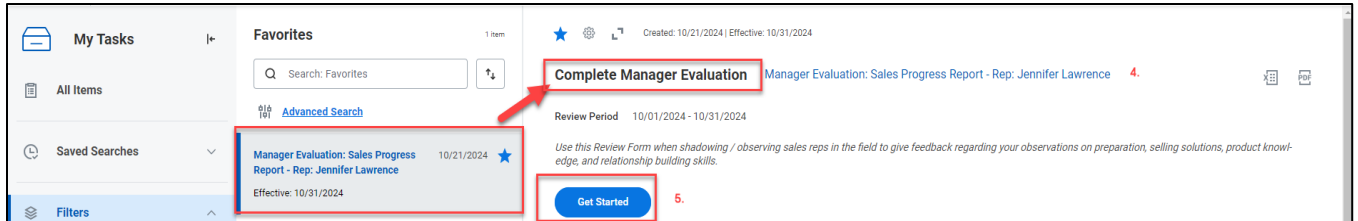
Period Start Date \* 11/01/2024

Period End Date \* 11/30/2024

Cancel Submit

4. You will receive a task titled “Manager Evaluation: Sales Progress Report – XXX” in your **My Tasks Inbox**. Click the task to open its details on the right-hand side of the screen.

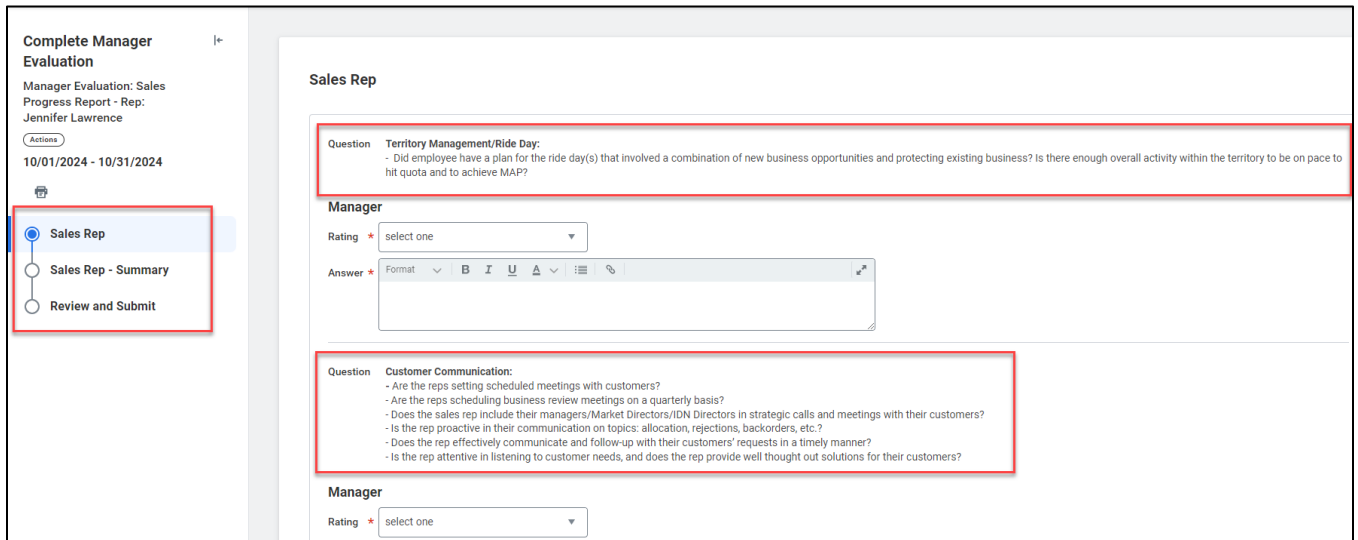
5. Click **Get Started**.



6. You will be guided through the steps that are listed on the left-hand side of the screen. Sales Progress Checks only have three steps. The questions will pre-populate specific to the template chosen.

You will have 4 rating options available for each question.

- a. Does Not Meet
- b. Needs Improvement
- c. Consistently Meets Expectations
- d. Exceeds Expectations



7. You will select a rating and provide an answer for each question.

**Complete Manager Evaluation**  
Manager Evaluation: Sales Progress Report - Rep: Jennifer Lawrence  
Actions  
10/01/2024 - 10/31/2024  
Sales Rep  
Sales Rep - Summary  
Review and Submit

**Question Territory Management/Ride Day:**  
- Did employee have a plan for the ride day(s) that involved a combination of new business opportunities and protecting existing business? Is there enough overall activity within the territory to be on pace to hit quota and to achieve MAP?

**Manager**  
Rating \* Consistently Meets Expectations  
Answer \* Normal Good Job.

**Question Customer Communication:**  
- Are the reps setting scheduled meetings with customers?  
- Are the reps scheduling business review meetings on a quarterly basis?  
- Does the sales rep include their managers/Market Directors/IDN Directors in strategic calls and meetings with their customers?  
- Is the rep proactive in their communication on topics: allocation, rejections, backorders, etc.?  
- Does the rep effectively communicate and follow-up with their customers' requests in a timely manner?  
- Is the rep attentive in listening to customer needs, and does the rep provide well thought out solutions for their customers?

**Manager**  
Rating \* Consistently Meets Expectations  
Answer \* Normal Good Job.

8. Answer the summary questions.

**Complete Manager Evaluation**  
Manager Evaluation: Sales Progress Report - Rep: Jennifer Lawrence  
Actions  
10/01/2024 - 10/31/2024  
Sales Rep  
Sales Rep - Summary  
Review and Submit

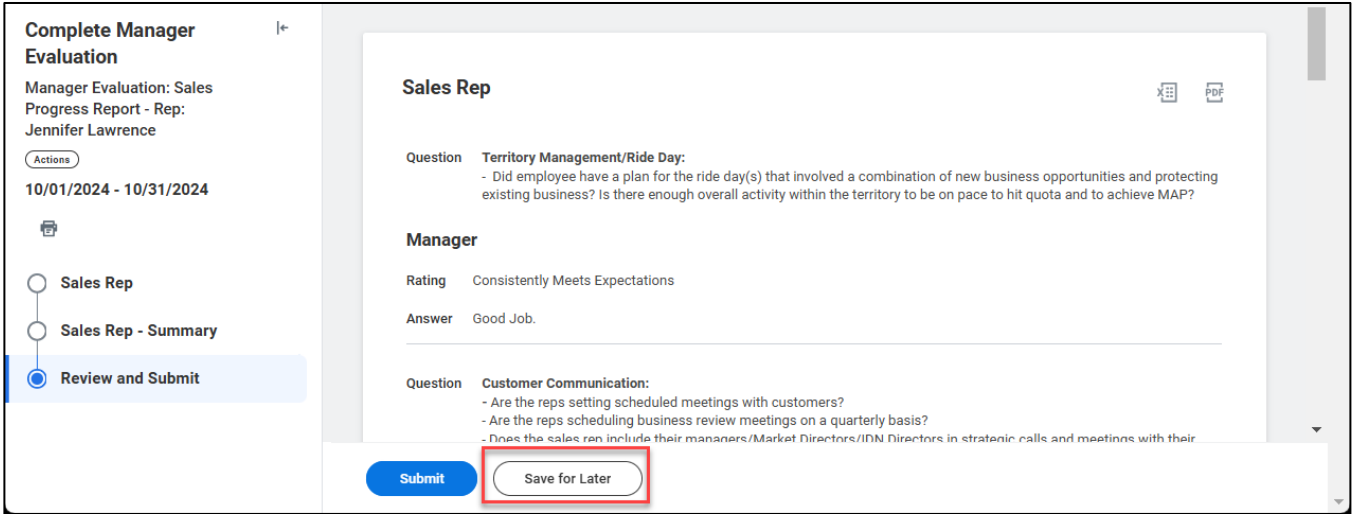
**Sales Rep - Summary**

**Question Summary:**  
- What is the rep currently doing well and what are specific examples?  
- What are the areas where the rep needs to focus on for improvement and what are specific examples?  
- Please list specific steps the rep needs to take to be successful.

**Manager**  
Answer \* Format

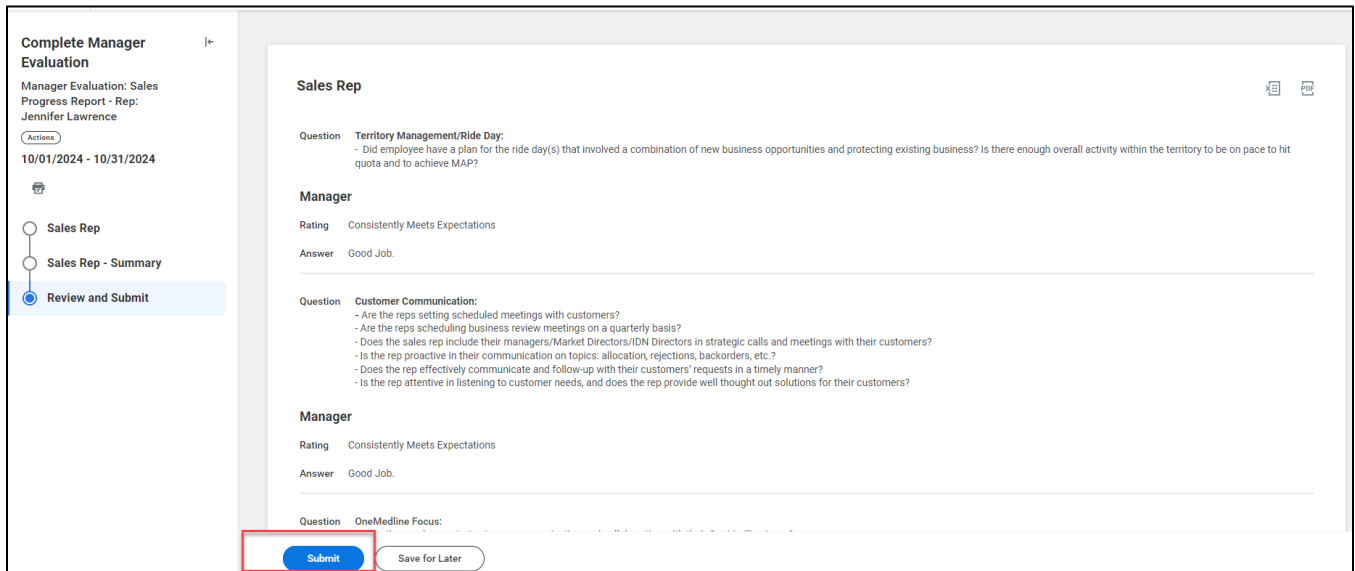
9. Review the progress check information and click **Save for Later** to allow for editing after meeting with the employee.

- a. Choosing Submit will send the review directly to the Employee and not allow for editing. Do not click Submit until after you have the meeting with the employee.



10. Once you have met with the employee and are ready to close the review, go back to your My Tasks Inbox and click **Get Started** to open the review (see Step 5 above).

Click **Next** to move to the Review and Submit step and click **Submit**.



11. This ends the review process. The employee will be able to see the review on their profile under the performance tab.

The screenshot displays a user profile for Jennifer Lawrence, a Sales Rep. The left sidebar contains navigation options: Summary, Job, Compensation, Contact, Personal, Pay, Performance (highlighted), Career, and Feedback. The main content area is titled 'Performance Reviews' and shows a table of completed reviews. The table has columns for Review, Review Period Start Date, Review Period End Date, View Review, and Create Review PDF. A single review is listed: 'Sales Progress Report - Rep: Jennifer Lawrence' with a start date of 10/01/2024 and an end date of 10/31/2024. The 'View Review' button is labeled 'View' and the 'Create Review PDF' button is labeled 'Create New PDF'.

Review	Review Period Start Date	Review Period End Date	View Review	Create Review PDF
Sales Progress Report - Rep: Jennifer Lawrence	10/01/2024	10/31/2024	<a href="#">View</a>	<a href="#">Create New PDF</a>