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SALES DEPARTMENT - PERFORMANCE, KPI AND CAREER PATHWAYS FOR EMPLOYEES

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Introduction

This report presents a structured framework for sales **titles' responsibilities**, **performance management** and **career development** within the Sales Department. It brings together measurable **KPIs**, role-specific expectations, and a unified evaluation.

The report aims to boost individual and team productivity, strengthen and improve the overall employee experience, encourage internal talent growth and promotion opportunities and align day-to-day operations with strategic objectives.

This report also includes a detailed KPI structure tailored to each sales role, an updated 10-point quarterly performance review model, promotion criteria based on performance and ethical behaviour.

Londonist DMC - Sales Hierarchy and Responsibility Map

Category	Sales Intern	Sales Representative	Sales Executive	Senior Sales Executive	Sales Team Lead
Seniority Level	Entry	Mid-Level	Advanced	Senior	Strategic/Leadership
Core Function	Sales support & Direct Sales	Direct sales & account management	Strategy execution & outreach	Mentorship, advanced sales, CRM streamlining	**Leadership, Strategy, CRM governance**
Key Responsibility	Upselling services, assist in CRM updates, selling rooms, respond to inquiries, admin tasks, market research	In addition to all Intern responsibilities - Prospecting, managing inquiries, event attendance	In addition to all Sales Rep responsibilities - Sales growth, account management, client guidance	Mentor team, streamline CRM, guide accounts, grow market share, resolve complex issues	**Manage multi-country sales ops, coach team, set daily KPIs, collaborate cross-functionally**
Leadership Duties	None	Mentored	Assist in team efforts	Mentor & train sales teams	**Lead full sales team globally**
Event Involvement	Rare	Attend & represent	Frequent participation	High-level representation	**Leads presence & positioning at events**
CRM Involvement	Information entry	Lead tracking & follow-ups	Monitor & optimise usage	Train, automate, and leverage data	**Govern CRM across team, integrate with ops**
Sales Strategy Role	Observational	Executional	Executional & Tactical	Strategic & coaching	**Strategic & operational leadership with the management**
Cross-functional Work	Light support	Moderate	High	Very high	**Full integration across departments**
Client Management	Inquiry support	Full-cycle booking & upselling	Full-cycle and Account expansion	Conflict resolution, personalisation	**Escalation handling & long-term retention**

Quarterly Performance Evaluation System for Sales Department (10-Point Scale)

Evaluation Frequency: Every 3 months

Total Score: 10 Points

1. Sales Target Achievement (Max 3 Points)

Objective: Assess whether the salesperson met or exceeded their sales target.

- 3 Points: Achieved 100% or more of the target
- 2 Points: Achieved 80% - 99% of the target
- 1 Point: Achieved 60% - 79% of the target
- 0 Points: Achieved less than 60% of the target

2. Sales Activity & Conversion Rate (Max 3 Points)

Objective: Evaluate engagement and efficiency in sales activities, including:

- 3 Points: 600+ calls/month, conversion rate above 7%
- 2 Points: 500-599 calls/month, conversion rate between 5% - 6.9%
- 1 Point: 350-499 calls/month, conversion rate below 5%
- 0 Points: Below 350 calls/month or poor conversion
- Number of extra service offers will also influence scoring

Clarification: Conversion rate must be defined as bookings divided by qualified leads. This ensures consistency across all sales roles.

3. Work Discipline & Desk Time (Max 2 Points)

Objective: Measure punctuality and time actively spent working.

- 2 Points: Always on time + meets desk time expectations
- 1 Point: Occasionally late OR below desk time expectation
- 0 Points: Frequent lateness OR significantly below expectation

4. Manager's Evaluation (Max 2 Points)

Objective: Gather qualitative feedback on performance, attitude, and teamwork.

Evaluation Categories:

- Communication & Collaboration
- Initiative & Problem Solving
- Responsibility & Work Ethic
- Customer Handling & Negotiation

Each item should be scored from 0 to 2.

Objective: Gather qualitative feedback on performance, attitude, and teamwork.

Manager's Evaluation Questions (Rate 0-2 Points):

1. **How proactive is the employee in sales and problem-solving?**
    - (0: Not proactive, 1: Sometimes, 2: Very proactive)
2. **Does the employee demonstrate a strong work ethic and take responsibility for their tasks?**
    - (0: Not proactive, 1: Sometimes, 2: Very proactive)
3. **How well does the employee communicate and collaborate with the team?**
    - (0: Poor, 1: Average, 2: Excellent)
    - (0: No, 1: Occasionally, 2: Regularly)
4. **How well does the employee handle customer relations and negotiations?**
    - (0: Poor, 1: Average, 2: Excellent)
5. **Does the employee take initiative to improve sales strategies?** (For sales Executives)
    - (0: Poor, 1: Average, 2: Excellent)

Final Scoring and Decision-Making

- 8-10 Points: Excellent Performance
- 6-7 Points: Good Performance; minor improvements needed
- 4-5 Points: Needs improvement; action plan required
- 0-3 Points: Poor performance; coaching or intervention required

Summary of Quarterly KPI-Based Career Progression Framework

Role	Objective / Purpose	Key KPIs	Promotion Criteria
Sales Intern	Build foundational skills in sales and CRM through admin support, outreach, and training tasks.	• Calls/day: 55 • Quotes/day: 8 • Service offers/month: Min. 25 • Feedbacks/month: Min. 5 • CRM accuracy: 98%+ • Inquiry response <24h: 90%+ • Admin accuracy: 95%	• 3–6 months of consistent KPI performance • High-quality quotes and service offers • Positive manager feedback
Sales Representative	Convert leads to bookings, maintain client relationships, and contribute to monthly revenue targets.	• Calls/day: 60 • Quotes/day: Min. 15 (≥250/month) • Service offers/month: Min. 20 • Feedbacks/month: Min. 5 • Conversion rate: ≥ 7% • Monthly target: ≥ 90% • CRM updates: 100%	• 12–18 months experience • Ownership of leads and admin • Consistent performance and service quality
Sales Executive	Drive sales performance, maintain CRM quality for self and team, and ensure student journeys are complete.	• Calls/day: 60 • Quotes/day: ≥ 15 (≥250/month) • Bookings/day: ≥ 12 • Feedbacks/month: ≥ 5 • CRM data accuracy: 100% • CRM oversight for Interns & Reps • Follow-ups within 48h • Target: ≥ 90%	• 18–72 months in role • Mentors junior staff • Owns CRM accuracy • Strong communicator and performer
Senior Sales Executive	Mentor the team, ensure sales performance across functions, manage CRM compliance, and uphold quality.	• Team target achievement: Min. 80% • CRM compliance/audits: Min. 98% • Ensure team quote volume: ≥ 250/month • Quote accuracy & consistency • Mentorship hours: ≥ 4/month • 1:1 reviews: Min. 4/month • Escalation handling	• Leads by example and influence • Contributes to team success and strategic direction • Excellent communicator
Sales Team Lead	Drive performance across Istanbul and London Teams, collaborate with MENA and China Managers, and ensure strategic cohesion.	• Team quota: Min. 90% • CRM/process adoption: Min. 90% across regions • Monthly audits: Quotes, CRM, Feedback • Efficiency improvements: Min. 1/qtr with HR & management • Escalation handling, budgeting, planning	Will be implemented later for Sales Manager or Head of Sales role.

KPI-Based Career Progression Framework

1. Sales Intern

Objective: Build foundational skills in sales and CRM through admin support, outreach, and training tasks.

Key KPIs:

- **Calls per day:** 55
- **Quotes per day:** 8
- **Service offers (upselling) made per month:** min 25
- **Feedbacks (Trust Pilot) submitted per month:** min 5
- **CRM data entry accuracy:** 98%+
- **Response time to inquiries:** Within 24h (min 90%)
- **Admin task accuracy:** 95%

Promotion to Sales Rep:

- 3-6-9 months consistent KPI performance
- Excellent quote/service offer quality
- Positive manager feedback on professionalism and communication

2. Sales Representative

Objective: Convert leads to bookings, maintain client relationships, and contribute to monthly revenue targets.

Key KPIs:

- **Calls per day:** 60
- **Quotes per day:** 15 min. (250/month)
- **Service offers (up selling) per month:** min. 20
- **Feedbacks (Trust Pilot) per month:** min. 5
- **Lead-to-booking conversion rate:** min 7%
- **Monthly target achievement:** min 90%
- **CRM updates:** 100% on all leads

Promotion to Sales Executive:

- 12-18 months experience
- Demonstrates ownership of leads & admin
- Consistent high performance + quality service

3. Sales Executive

Objective: Drive sales performance, maintain CRM quality for self and team, and ensure every student journey is complete and professional.

Key KPIs:

- **Calls per day:** 60
- **Quotes per day:** 15 (≥ 250/month)
- **CRM data accuracy:** 100% (for own leads and oversight of Interns & Reps)
- **Feedbacks (Trust Pilot) per month:** ≥ 5
- **Bookings per day:** ≥ 12
- **Monthly target achievement:** ≥ 90%
- **Follow-up timeliness:** 100% within 48h

Promotion to Senior Sales Executive:

- 18-72 months in role
- Mentors junior staff
- Takes ownership of CRM integrity
- Strong communication and performance across cycles

4. Senior Sales Executive

Objective: Mentor the team, ensure sales performance across functions, manage CRM compliance, and uphold quality control.

Key KPIs:

- **Team target achievement:** min. 80%
- **CRM compliance & audits:** min. 98%
- **Monitor quotes/month**: Ensure Reps & Execs hit min. 250/month
- **Quote accuracy & consistency checks**

- **Mentorship & coaching hours:** min. 4/month
- **Sales agents reviews:** one on one min 4 times per month / reported to HR
- **Handles escalated cases & special requests**

Promotion to Sales Team Lead:

- Leads by influence, not just performance
- Contributes to sales performance and strategic discussions
- Excellent internal communication

5. Sales Team Lead

Purpose: Drive performance across Istanbul and London Teams, work collaboratively with Mena and China Managers, develop team talent, and ensure operational and strategic cohesion.

Key KPIs:

- **Team quota achievement:** min. 90%
- **CRM & process adoption:** min. 90% across regions
- **Audit oversight:** Monthly quote, feedback, and CRM usage audits
- **Sales efficiency improvements and performance measurements:** min. 1 implemented per quarter with management and HR.
- **Escalation handling, budgeting, sales planning**

Conclusion

This report aimed to offer a structured performance-driven approach to developing talent within the Sales Department.

It is important to note that **all figures and thresholds provided in this report are illustrative** and may be subject to change. Final targets and benchmarks will be **re-evaluated and confirmed by management** in line with evolving business priorities and strategic direction.

This framework is designed to be adaptable, ensuring it remains relevant and effective as the company scales. With a shared understanding of expectations and growth opportunities.