

Sales reference call worksheet

Record relationship, direct observations, unanswered questions, and support the new manager needs to provide.

<https://accountexecutivejobs.com/blog/hiring-salespeople/sales-reference-check-questions>

Relationship and period

Direct observation

Limits or unknowns

Follow-up

Work directly observed

Direct observation

Limits or unknowns

Follow-up

Buyer and segment

Direct observation

Limits or unknowns

Follow-up

Pipeline source

Direct observation

Limits or unknowns

Follow-up

Result measure and period

Direct observation

Limits or unknowns

Follow-up

Territory and support context

Direct observation

Limits or unknowns

Follow-up

Deal contribution

Direct observation

Limits or unknowns

Follow-up

Loss and response

Direct observation

Limits or unknowns

Follow-up

Feedback and change

Direct observation

Limits or unknowns

Follow-up

Forecast and team updates

Direct observation

Limits or unknowns

Follow-up

Customer handoff

Direct observation

Limits or unknowns

Follow-up

Support for next manager

Direct observation

Limits or unknowns

Follow-up

Effect on role requirements

Direct observation

Limits or unknowns

Follow-up
