# Sales Representative Reference Check Template

For phone or written reference checks. Use the same questions for every referee so answers are comparable.

## 1. Candidate and referee details

Candidate name

Role applied for

Referee name

Referee job title and organisation

Referee email and phone

Relationship to the candidate (for example, direct manager)

Date of reference check

Checked by

## 2. Consent

*Confirm the candidate agreed to you contacting this referee. Tell the referee their answers are used only for this hiring decision.*

Candidate consent confirmed (yes / no)

Date consent was given

## 3. Verification questions

**1. How do you know the candidate, and what was your working relationship?**

**2. What were the candidate's start and end dates, as far as you remember them?**

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3. What was their job title, and did it change while you worked together?

4. Did the candidate report to you directly? If not, how often did you see their work?

5. What were the main reasons the candidate left, as far as you know?

## 4. Performance questions

6. Which parts of the role did the candidate own day to day?

7. Tell me about a deadline the candidate missed or nearly missed. What happened next?

8. Give an example of the candidate producing good work with incomplete information.

9. What result improved while they were in the role, and what was their contribution?

10. When results were below expectations, how did they respond to feedback?

11. What skill did the candidate develop most while you worked together?

## 5. Sales Representative questions

12. What did the candidate sell, to whom, and what was the typical deal size?

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**13. How did they perform against quota over the time you managed them?**

**14. How did they build pipeline: inbound, outbound, referrals?**

**15. How accurate were their forecasts and CRM records?**

**16. Tell me about a deal they lost. What did they do next?**

**17. How did clients describe working with them?**

**18. Did you ever have concerns about how they closed deals or represented the product?**

**19. Would you hire them onto your sales team again?**

## 6. Working style and integrity

**20. Describe a disagreement the candidate had with a colleague. How did they move the work forward?**

**21. How did the candidate ask for help when they needed it?**

**22. When the candidate made a mistake that affected others, what did they do?**

**23. What would you tell a new manager about working with this person?**

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## 7. Closing questions

**24. Is there anything we have not asked that you think we should know?**

**25. What kind of manager or team would get the best out of this person?**

**26. Would you hire or work with this person again? Why or why not?**

## 8. Recommendation

Overall: recommend / recommend with reservations / do not recommend

Strengths confirmed

Concerns or follow-ups

Signed and dated

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