



# of New Appts.	# of Call Backs	# of On-	Site Visits	# of Accoun	ts Sold	old \$ Sol		Sold	
Prospect A Sales Representative:									
Prospect B									
Prospect C			Carla a Mar						
Prospect D			Sales Ma	nager:					
Prospect E			Date:						
	Prepara	ation/Pr	e Call Pl	anning:					
						PR	OSPEC	TS	
					А	В	С	D	Е
1. Good Time and Te	erritory Management?	1							
2. Did salesperson have the appropriate product samples (including new products) in car, that were neat and organized and ready to present?									
3. Pre-Call Planning	Tool Completed?								
Comments:									
		•••••				*********			







4 - Exceeds Expectations 3 - Meets Expectations 2 - Improvement Needed

	Rapport Building:								
		PROSPECTS							
		А	В	С	D	E			
1.	Did the salesperson develop personal rapport, and build a connection?								
2.	Was an agenda set?								
3.	Did the salesperson determine 1-2 business objectives?								
4.	Did the salesperson uncover 2-3 buying motives?								
5.	Did the salesperson determine the decision making process and players?								
6.	Did the salesperson provide a brief introduction of [COMPANY]?								
7.	Did the salesperson summarize key BO's, BM's and decision making process?								
С	omments:								
••				• • • • • • • • • • • • • • • • • • • •					
**				• • • • • • • • • • • • • • • • • • • •	••••••	•••••			
••									
**		•••••	••••••	•••••		•••••			

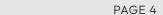






Discovery & Tour:								
	PROSPECTS							
	А	В	С	D	Е			
1. Did the salesperson (P)osition the conversation of a key pain point?								
2. Did the salesperson (A)ffirm the pain point and gain (A)greement on it?								
3. Did the salesperson (I)dentify how this pain point negatively affects BM's & BO's?								
4. Did the salesperson establish the (N)eed to show a solution in order to earn the business?								
5. Did the salesperson successfully identify some goals/aspirations of the prospect?								
Comments:								

	Presentation:								
		PROSPECTS							
		А	В	С	D	Е			
1.	Presented only to requirements set in the Discovery session?								
2.	Salesperson effectively used story telling to illustrate the solution?								
3.	Effectively presented an ROI Case?								
4.	Presented samples/provided demo where applicable?								
5.	Gained agreement that [COMPANY]'s solutions are superior?								
С	Comments:								
				,	************				





	the state of the s	-	1			
	Close & Handling Objections:					
		PROSPECTS				
		А	В	С	D	Е
1.	Did the salesperson summarize benefits and ask for the business?					
2.	Was (E)mpathy demonstrated when dealing with objections?					
3.	Did the salesperson have the prospect (A)rticulate the real objection?					
4.	Did the salesperson (R)emove the potential of additional objections?					
5.	Did the salesperson respond effectively and (S)olve the Objection?					
6.	Did the salesperson ask for the business again?					
С	omments:					
						• • • • • • • • • • • • • • • • • • • •
	Asking for Referrals::					
			PR	OSPEC	CTS	
		А	В	С	D	Е

Asking for Referrals::								
PROSPECTS								
	А	В	С	D	Е			
Did salesperson ask for referrals?								
Comments:								



PAGE 5

Call Back Strategy (If order is not secured)									
PROSPECTS									
А	В	С	D	Е					
• • • • • • • • • •									
• • • • • • • • • •									
. for	ma	t):							
	A	A B	PROSPEC	PROSPECTS A B C D					