

# of New Appts.	# of Call Backs	# of On-Site Visits	# of Accounts Sold	\$ Sold

Prospect A	Sales Representative:	
Prospect B		
Prospect C		
Prospect D		
Prospect E		
	Sales Manager:	
	Date:	

Preparation/Pre Call Planning:

	PROSPECTS				
	A	B	C	D	E
1. Good Time and Territory Management?					
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:

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

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Rapport Building:					
	PROSPECTS				
	A	B	C	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?					
Comments:					

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

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Discovery & Tour:					
	PROSPECTS				
	A	B	C	D	E
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				
	A	B	C	D	E
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?					
Comments:					

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

Close & Handling Objections:					
	PROSPECTS				
	A	B	C	D	E
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?					
Comments:					

Asking for Referrals::					
	PROSPECTS				
	A	B	C	D	E
1. Did salesperson ask for referrals?					
Comments:					

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

Call Back Strategy (If order is not secured)

	PROSPECTS				
	A	B	C	D	E
1. Clearly defined interim action plan?					
2. Date and Time of Next Appointment defined?					
Comments:					

Developmental Objectives (in the S. M. A. R. T. format):

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