

Joint Call Check-In

Salesperson	
Prospect	
Date	

What is your objective for this call?

Evaluation

poor					excellent				
P	1	•	2	•	3	•	4	•	5
G	1	•	2	•	3	•	4	•	5
Q	1	•	2	•	3	•	4	•	5
D	1	•	2	•	3	•	4	•	5
I	1	•	2	•	3	•	4	•	5
C	1	•	2	•	3	•	4	•	5

Evaluated by

Joint Call Check-In

Coaching Guide

Prospect		
1. Did the salesperson have adequate knowledge of the prospect prior to sales call?	YES	NO
What specific information did the salesperson have? What information did the salesperson lack?		
How could they have done better?		
2. Did the salesperson fully prepare for the sales call (on-time, dress, etc)?	YES	NO
Comment		

Greet		
1. Did the salesperson issue a Statement of Intention?	YES	NO
2. Did the salesperson develop trust and rapport early in the process?	YES	NO
If YES, what did the salesperson do well? If NO, what could have been done better?		
3. Did the salesperson ask for permission to ask questions?	YES	NO
4. Did the salesperson ask for permission to record the answers?	YES	NO

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Qualify

1. Did the salesperson ask questions that allowed the prospect to discover their needs and wants, discuss problems or identify solutions they're seeking?	YES	NO
If YES, what types of questions were most effective in getting the prospect to focus on specific needs?		
2. Did the salesperson ask questions in a conversational, non-confrontational way?	YES	NO
3. Did the salesperson avoid prematurely presenting product/service?	YES	NO

Demonstrate

1. If this step was not reached, did salesperson set a time and date for the next appointment?	YES	NO
2. Did the salesperson have a full understanding of the prospect's objectives and the benefits the prospect/client wants to receive before making a recommendation?	YES	NO
3. Did the salesperson present an effective solution both to and for the prospect?	YES	NO
If NO, if an effective solution was not presented, why was it not done? If it was not done, when should a solution be presented?		
4. Did the salesperson stress the key benefits that the prospect wants to achieve?	YES	NO
5. Did the salesperson ask feedback questions to determine if their solution was on target?	YES	NO
6. Did the salesperson create sufficient value to offset the perception of price?	YES	NO
If YES, how was it done? If NO, how could it have been accomplished?		
7. Did the salesperson present price with confidence and no hesitation?	YES	NO



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Influence

1. Did the salesperson provide third party testimony, social proof or offer the prospect the opportunity to talk with or meet happy, satisfied customers?	YES	NO	N/A
2. If a trial or test was necessary, did the salesperson offer it?	YES	NO	N/A
3. Did the salesperson establish movement to the next step of the sales process, if applicable?	YES	NO	

What is the next step?

Close

1. Did the salesperson ask prospect to buy at the appropriate time?	YES	NO	N/A
If a sale was made, did the salesperson reinforce the decision made by prospect, agree to follow-up, etc.?	YES	NO	

If YES, what actions were taken? If NO, how could it have been accomplished?



Joint Call Check-In

Follow-Up Report

Salesperson	
Manager	
Evaluator	
Date	

Observations	
Strengths	
Challenges	

Recommendations

Follow-Up/Accountabilities	
Date	
Actions	