Sales Call Evaluation Form

Name_____
Date_____
Time_____
Evaluator_____

Objective of call stated	**1** Poor	**2** Fair	**3** Good	**4** Excellent	**5** Exceptional	**N/A** Not Applicable
Understand the needs and concerns of prospect…						
Can (company) and (product) meet those needs						
Format of call explained						

Needs Analysis	**1** Poor	**2** Fair	**3** Good	**4** Excellent	**5** Exceptional	**N/A** Not Applicable
Discovered what motivated prospect to inquire						
Review of value analysis						
Reviewed prospects other needs						
Discovered prospects concerns / questions						
Paraphrased needs/wants/concerns						

Comprehensive Value	**1** Poor	**2** Fair	**3** Good	**4** Excellent	**5** Exceptional	**N/A** Not Applicable
Explained comprehensive value of working with Company/Product in manner that relates value						
Training – online, server, on site, mentor, customer service						
Transition – pre-installed, tested, conversion, support						
Product Demo – objective stated, duration						
Scheduled Demonstration						
Discussed Billing						
Discussed Reports						
Discussed Support						

Closing	**1** Poor	**2** Fair	**3** Good	**4** Excellent	**5** Exceptional	**N/A** Not Applicable
Relationship investment discussed in detail						
Next steps covered, appointments confirmed						

Other Selling Skills	**1** Poor	**2** Fair	**3** Good	**4** Excellent	**5** Exceptional	**N/A** Not Applicable
Active Listening						
Summarize						
Clarify						
Confirm						
Probing						

Succinct process & language						
Tied back to prospect needs/wants						
Uncovering needs						