

Please rate each student with a score ranging from 0 to 10—Use whole numbers only
0 (meaning the skill was not shown),
5 (meaning this is what you might expect from a new inexperienced salesperson)
10 (meaning the skill level typically demonstrated by an experienced salesperson).



5 % MEETING OPENING (Effectively gains attention and builds rapport)

- _____ Professional introduction: (intro self – full name, correctly identify buyer by name, eye contact)
- _____ Establishes/builds rapport: (raise comfort of prospect; build trust)
- _____ Salesperson engages prospect: (problem to be solved, possible value/benefit, WIFM-What’s in it for me?, etc.)
- _____ Sets agenda (situation appropriate) and gains commitment to continue: (appropriate transition to Needs ID and is positioned to ask questions/uncover needs)

45% NEEDS IDENTIFICATION (OBJECTIVE: Obtain a clear understanding of customer’s situation in order to prepare a customized presentation)

- _____ Uncovers decision process (decision criteria, people involved in decision process, potential timing issues)
- _____ Effectively determines relevant facts about company and/or buyer
- _____ Effectively gains a basic understanding of the prospect’s problems and/or challenges
- _____ Explores the implications of those problems/challenges (consequences, costs, missed opportunities, etc.)
- _____ Summarizes the problems/issues uncovered, gains a pre-commitment to consider the product/service and smoothly transitions to presentation

10% PRESENTATION

- _____ Presents a brief overview of the company and a potential solution to build enough credibility to gain a second appointment to present the solution
- _____ Uses appropriate/professional visual aids as necessary (testimonials, 3rd party evaluations, graphs, charts, data, etc.)

15% OVERCOMING OBJECTIONS (OBJECTIVE: Eliminate concerns or questions to customer’s satisfaction)

- _____ Initially gains better understanding of objection (clarifies or allows buyer to clarify the objection)
- _____ Responses are appropriate and helpful to the buyer
- _____ Confirms that the objection is no longer a concern of the buyer (buyer responds)

10% GAINS COMMITMENT (OBJECTIVE: Take initiative to understand where you stand with buyer now and for the future)

- _____ Persuasive in presenting a reason to commit to another appointment
- _____ Asks for an appropriate commitment from the buyer, given the nature of this particular sales call

10% PROFESSIONAL COMMUNICATION

- _____ Effective verbal speaking skills (appropriate grammar and English, minimum “ums,” “likes,” “you knows,” etc. and minimizes abstract language without explanation: “great,” “super,” “awesome,” etc.)
- _____ Effective listening skills (active listening; restates, rephrases, clarifies, probes for better understanding, etc.)
- _____ Appropriate non-verbal communication (eye contact, posture, appropriate attire)
- _____ A flowing conversation rather than a scripted role-play

5% CREDIBLE AND TRUSTWORTHY

- _____ Clearly knowledgeable/credible about the product, the industry and business in general
- _____ Enthusiasm and confidence

Comments: _____

