

SALES CALL REVIEW WORKSHEET

OVERALL CALL GOAL	YES	NO
1. Did the sales rep have a specific goal for the call before the call began?		
2. Was this goal achieved?		
FEEDBACK ON WHY GOAL NOT ACHIEVED OR OTHER GUIDANCE / ACTION POINTS TO WORK ON		

SALES PITCH	YES	NO
3. Did the rep follow your sales pitch?		
4. How well did the rep deliver the pitch?		
5. Did the rep demonstrate strong product knowledge?		
6. Was the rep able to answer questions?		
FEEDBACK / ACTION POINTS		

INFORMATION GATHERING AND BUYER RAPPOR T	YES	NO
7. Did the rep ask questions that effectively elicited actionable information from the buyer?		
8. Did the rep demonstrate understanding of the buyer's needs and empathy?		
9. Did the rep practice active listening?		
10. Did the rep listen more than he or she talked?		
11. Did the rep interrupt the client?		
FEEDBACK / ACTION POINTS		

SALES REP ATTITUDE	YES	NO
12. Did the rep convey confidence, professionalism, and likeability?		
13. Did the rep sustain energy throughout the call?		
14. Did the rep seem to enjoy his or her job?		
15. Was the rep influenced by any negativity from the prospect?		

FEEDBACK / ACTION POINTS

OVERALL FEEDBACK, GOALS, ACTION POINTS FOR NEXT REVIEW



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