**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 RAPPORT** | **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** |
|   |

|  |
| --- |
| **DISCLAIMER**Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |