SALES CALL REFLECTION

Important Note: Self-reflection creates self-awareness and keeps things on top of mind.

Salesperson: Date:

Company Name: Name of Champion:

Call Evaluation

Why will this deal happen?

a. Buying signals you heard/observed on the call:

b. What challenges did the client share?

c. Value added from our offering – How do we stand out against the competition?

d. Needs aligned with our solution? ☐ Yes ☐ No

Deal breakers identified:

Personal information learned from rapport building:

Decision-Making Criteria and Process

Stakeholders involved:

☐ Influencer ☐ Decision-Maker

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Decision-making criteria, aside from money:

Obtained budget? ☐ Yes ☐ No If yes, what's the budget or range?

Competitors:

Are they looking at any alternatives? ☐ Yes ☐ No

If yes, who?

What advantages do we have over the competitors?

Timeline:

Decision Date: Is that a want or need date? ☐ Want ☐ Need

What is impacting that?

Clear plan of action detailing next steps for both sides:

Solutions Call

Verify that information above hasn't changed! If changed, please add to or update information above. Use the checklist below to identify what you did successfully on the call.

- ☐ 75% listening – 25% talking
- ☐ Made them smile/laugh.
- ☐ Used empathy to normalize a problem or relate.
- ☐ Prospect shared past negative or positive experiences.
- On a 1-10 scale, what level of energy/positivity did you convey?
- ☐ Made at least two recommendations/suggestions.
- ☐ Shared a client story to overcome an objection.
- ☐ Prospect shared all their objections. (used "Anything else?" language)
- ☐ Shared a client story to differentiate your offering from the competition.
- ☐ Customer said at least one time, "Great idea!" or "I didn't think of that."
- ☐ Used all contact's name(s).
- ☐ Used the "Rule of 3" to capture and sustain the prospect's attention.
- ☐ Mirrored their demeanor, personality, and communication style.
- ☐ Checked in at least three times during the call to gauge interest.
- ☐ Used reflective listening to clarify and restate what you heard.
- ☐ Recognized words or tone that expressed concern/confusion.
- ☐ Noticed and acted on changes in body language. (if applicable)

Used these types of questions...

- ☐ Rapport-building questions (and not right into details)
- ☐ Questions to proactively avoid objections
- ☐ Root cause questions (to determine the consequences of the pain)
- ☐ Leading questions (to earn the right to talk about selling points)