



In our post [How to successfully evaluate sales calls with your junior reps](#) we outlined 7 attributes to judge your junior sales reps on during a sales call.

1. **The goal:** What should be the outcome of the call?
2. **The pitch:** How well does the rep know the sales pitch?
3. **The facts:** Is your rep being honest with their prospect?
4. **The confidence:** How comfortable is your rep?
5. **The energy:** Can your rep maintain a high energy?
6. **The connection:** Can your rep build rapport with their prospect?
7. **The listening skills:** How well does your rep listen to their prospect?

This checklist includes:

- A brief explanation of why these attributes are important
- A set of questions for each attribute
- A scoring system or a YES/NO option
- A room for improvement section for each attribute
- A section with the main feedback for your rep

Print this checklist out and let's get started!

The Goal

Every sales call should result in a specific outcome, otherwise you won't know if the call was successful.

Answer the below questions by circling YES or NO.

1. Did the sales rep have a clear goal in mind before going into the call? **YES / NO**
2. Was this goal accomplished? **YES / NO**

If NO, why was the goal not accomplished?

Notes

Feedback for your rep

Notes

Internal notes (Only for you)

Notes

The Pitch

The sales pitch is designed to persuade a prospect to buy, your rep should know it inside out. While you review it, break the pitch into three parts: beginning, middle, and end.

Rate the below on a 1-10 scale. 1 being "Very poorly" and 10 being "Very well."

1. How well does your rep follow the structure of the sales pitch? **Score:** _____
2. How well are they able to deliver the sales script? **Score:** _____

Feedback for your rep

Notes

Internal notes (Only for you)

Notes

The Facts

The best reps are honest and stick to the facts as to not mislead their prospects. Time to see how truthful your rep is throughout the call.

Answer the below questions by circling YES or NO.

1. Did they say things that are incorrect? **YES / NO**
2. Did they hide from things they thought would cause an obstacle? **YES / NO**

Feedback for your rep

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Internal notes (Only for you)

Notes

The Confidence

Confidence goes a long way in sales, how comfortable is you rep in their sale shoes?

Rate the below on a 1-10 scale. 1 being "Not confident at all" and 10 being "Very confident."

1. How confident is the rep with the script? **Score:** _____
2. How confidently is the rep dealing with objections? **Score:** _____

Feedback for your rep

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Internal notes (Only for you)

Notes

The Energy

A great energy is infectious and can influence the prospect positively. But high-energy levels are hard to maintain—can your rep stay consistent?

Answer the below questions by circling YES or NO.

1. Can your rep maintain a high level of energy? **YES / NO**
2. Is your rep influenced by the energy of the prospect or customer? **YES / NO**
3. Could you tell that your rep is having fun? **YES / NO**

Feedback for your rep

Notes

Internal notes (Only for you)

Notes

The Connection

People buy from people they like. How likable is your sales rep?

Rate the below on a 1-10 scale. 1 being "Very Low" and 10 being "Very high."

1. Level of engagement. **Score:** _____

2. Level of rapport. **Score:** _____

3. Likability. **Score:** _____

Feedback for your rep

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Internal notes (Only for you)

Notes

The Listening Skills

Great salespeople listen more than they talk, so they can truly understand the needs of their prospects. How good of a listener is your rep?

Answer the below questions by circling YES or NO.

1. Did the salesperson talk more than they listened? **YES / NO**
2. Did they interrupt the prospect? **YES / NO**
3. When the prospect provided information that seemed incomplete, did the rep realize it and actively tried to get more answers? **YES / NO**

Feedback for your rep

Notes

Internal notes (Only for you)

Notes

Main Feedback for your Rep

Compare your feedback for each of the seven attributes. Then choose ONE thing that your rep should strive to improve for the next call review.

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