

## SALES CALL AUDIT FORM

### IMPLEMENTATION PROCEDURE

The Sales Call Audit Form is a checklist designed for use by sales managers to enhance their field coaching activities with sales representatives. The most effective location for representative development is in the field. The most effective managers consistently coach their representatives in real life sales activities.

Use the Sales Call Audit Form as a checklist to provide the nucleus of a field activity sales development system. Please note, a list should be completed for each day in the field with a sales representative. Use these to help you avoid some of the common mistakes managers make when coaching.

### MISTAKES TO AVOID

- A. **Don't do all the selling for the sales representative.** You were probably promoted to the position of manager due to your superior selling skills. Granted, there are some benefits to you handling sales calls as demonstration for your representative, but if you do all the selling, your field day will not be a developmental day. The only skill you will allow your sales representative to practice is their ability to drive a car!
- B. **Resist the temptation to save a representative in a dangerous or negative situation.** The best managers are capable of watching a representative get very close to losing or jeopardizing an order, yet are able to rescue them before the final negative decision can be made. A representative tends to learn the most when they recognize their inability to pursue the sale any further, before a manager intercedes and saves the day. Although it is very natural to want to assist your representatives prematurely, please resist this temptation. This is a judgmental exercise that will require additional practice on your part to perfect.
- C. **Do not save all your coaching, counseling, and advice for one lump session after a days' worth of sales calls.** Debrief the representative, no matter how quickly, as soon as possible after each sales call. Find a convenient coffee shop to dispense your coaching and counseling. Don't do it while traveling to the next account.
- D. **Do not dwell on negative information.** A negative debriefing will distance you from your representative and make it virtually impossible to produce any constructive activity through the course of the day. Instead, utilize the "sandwich" technique. This technique is based on the principle of prefacing bad news with some good news, and then immediately following the bad news with some more good news. This sandwich of information allows the representative to walk away from the

debriefing with at least some positive feelings about their performance. Very few sales representatives do *everything* incorrectly in a field sales environment. With these thoughts in mind, you should utilize the following checklist to evaluate your sales representatives' day in the field with you.

#### **DAILY PLANNING**

- Did the representative present you with a well-developed daily plan?
- Did the daily plan maximize face-to-face time with customers and minimize driving time?
- Did the representative present a daily plan that included all necessary sales support materials, tools, proposals, etc.?
- Was the representative on time for your pre-day meeting?
- Was the representative dressed appropriately for the sales call?
- Did the representative display an enthusiastic and optimistic view towards the upcoming events of the day?

## SALES CALL AUDIT FORM

**Instructions:** Rate the following on a scale of 1 through 5  
(1 = Failed, 5 = Excellent)

### PRE-CALL AND APPROACH

Greeted each contact in a friendly manner.	<input type="text"/>
Each call was well-planned.	<input type="text"/>
Effectively used a one-minute monologue as an introduction.	<input type="text"/>
Used reflective questions to probe for information.	<input type="text"/>
Called on the correct person.	<input type="text"/>
Appropriately emphasized USP's (Unique Selling Propositions).	<input type="text"/>
Displayed a professional and positive image to the customer.	<input type="text"/>
Related benefits to the prospect for further action.	<input type="text"/>
Introduced the concept of closing for <i>all</i> of the account's business, rather than just one product line or service.	<input type="text"/>

### THE CALLS

Presented benefits and related them to the prospect's needs.	<input type="text"/>
Collected valid decision-making criteria.	<input type="text"/>
Followed the ninety-ten listening rule (listen 90%, talk 10%)	<input type="text"/>
Dealt with objections openly and confidently.	<input type="text"/>
Used trial closes smoothly and frequently.	<input type="text"/>
Responded confidently to competitive challenges.	<input type="text"/>
Answered prospect's questions with selling statements.	<input type="text"/>
Collected information regarding customer's future plans.	<input type="text"/>

Used sales aids smoothly.	<input type="text"/>
Obtained referrals.	<input type="text"/>
Ended each call with a commitment to future action.	<input type="text"/>
Smoothly clarified any improper information.	<input type="text"/>
Displayed good listening skills.	<input type="text"/>
Maintained control of the meeting.	<input type="text"/>
Properly qualified each prospect.	<input type="text"/>
Clearly understood the prospect's needs and goals.	<input type="text"/>
Closed at every opportunity.	<input type="text"/>
Developed a sound understanding of the prospects.	<input type="text"/>
Sold your company (as well as its products).	<input type="text"/>

#### **GENERAL EVALUATION**

Presentations followed a smooth, logical flow.	<input type="text"/>
Displayed strong industry and product knowledge.	<input type="text"/>
Accurately established customer/prospect expectations.	<input type="text"/>
Displayed a complete knowledge of competitors.	<input type="text"/>
Showed enthusiasm.	<input type="text"/>
Shared success stories.	<input type="text"/>
Displayed a helpful, cooperative attitude.	<input type="text"/>
Used the Opportunity Evaluation Form	<input type="text"/>

## RECOMMENDATIONS

Recommended action for future development (manager may suggest the sales representative participate in developmental activities):

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---