Discovery scorecard

Use the below questions to review the first interaction a sales rep has with a customer.
(5 stars is the highest, 1 the lowest)

1. Overall, how would you rate this call?

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2. How well did the rep identify the WHY of the customer? (Why are they calling us or agreeing to a meeting?)

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3. How well did the rep identify key results they customer is wanting?

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4. How well did the rep identify what success looks like? (Specific metrics of success or ROI (return on investment) or ROT (return on time)

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5. How well did the rep identify competitive solutions or alternatives?

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6. How well did the rep resolve any customer concerns or questions?

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7. How well did the rep do on giving the company overview and value proposition?

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8. How well did the rep do on identifying the buying process?

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9. How well did the rep do on identifying buyers?

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10. How well did the rep do on building rapport with the customer?

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11. How well did the rep do on building value in the next call/step to move forward in the buying process?

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12. What feedback or notes of what they did well?

13. What feedback or notes of suggestions to do better?