

Mandy Hancock Law Firm
Call Review Scorecard

Firm Information	
Firm: Mandy Hancock Law Firm	Date:
Dragon:	Total Call Time:
The Opening	
Introduction	0/1
Confirm Time	0/2
Confirm Confidentiality	0/2
Permission to Record/Take Notes	0/2
Proposed an Agenda- set Clear Outcome	0/3
Total Score	0/10
Feedback:	
Problem Identification	Score
Current State: Where are you today?	0/2
How do they Feel?	0/3
Confirm pending court/mediation/deadlines	0/3
Future State: Where would you like to be?	0/5
Obstacles: What is preventing you from you desired future state?	0/5
What have you tried in the past?	
Negative Outcome: What happens if nothing changes?	0/2
Why is this important to do now?	0/5
How do they Feel?	0/3
Total Score	0/28

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Feedback:

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Possible Solutions	Score
Summarize their goals and what you heard	0/2
Ask permission to review a few options (here or elsewhere)	0/1
Review the 4 Options (may not need all) - You Could do Nothing - You Could do it Yourself - You Could Keep Searching - We can get started today working together	0/4
Get a confirmation they want to move forward	0/2
Clearly explain the firm offering	0/2
Highlight the benefits of the offering to their goals	0/2
Clearly explain the cost and ask for payment	0/2
Total Score	0/15
Feedback:	
The Close	Score
Clearly identifies who will do what by when	0/5
Collects payment or clearly sets a plan to receive payment	0/5
Gives detailed post sign-up next steps	0/5
Total Score	0/15
Feedback:	
Sales Call Score	0/68