

IMPACT Selling

Joint Call Coaching Audit

Recruiter: _____

Applicant: _____

Date: _____

Scoring Key:

- 1: Required skills/actions not performed at all
- 2: Required skills/actions need improvement
- 3: Required skills/actions performed satisfactorily
- 4: Required skills/actions performed in excellent fashion
- 5: Total Mastery of required skills/actions

Scoring:

I - 1 • 2 • 3 • 4 • 5

M - 1 • 2 • 3 • 4 • 5

P - 1 • 2 • 3 • 4 • 5

A - 1 • 2 • 3 • 4 • 5

C - 1 • 2 • 3 • 4 • 5

T - 1 • 2 • 3 • 4 • 5

Scored by: _____



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Investigate Step

1. Did the recruiter have adequate knowledge of the applicant prior to the interview?

- YES NO

2. What specific information did the recruiter have? What information did the recruiter lack? What could they have done better?

Comments: _____

2. Was the recruiter fully prepared for the presentation (on-time, materials, etc.)?

- YES NO

Comments: _____

Meet Step

1. Did the recruiter issue a Statement of Intention?

- YES NO

2. Did the recruiter issue a Primary Bonding Statement?

- YES NO

3. Did recruiter develop trust and rapport early in the process?

- YES: What did the recruiter do well? _____

- NO: What could the recruiter have done better? _____

4. Did the recruiter ask permission to ask questions?

- YES NO

5. Did the recruiter ask permission to record the answers?

- YES NO



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Probe Step

1. Did the recruiter ask questions that allowed the applicant to explain needs, discuss problems or identify solutions they're seeking?

- YES: What types of questions were most effective?

- NO: Why were the questions ineffective in getting the applicant to open up?

2. Did the recruiter ask questions in a conversational, non- confrontational way?

- YES NO

Comments: _____

3. What "stars" did the recruiter uncover in the Probe Step? _____

4. Did the recruiter issue a summary statement and confirm the applicant's needs?

- YES NO

Comments: _____

5. If the recruiter could not move to the Apply Step at this time, did he/she set a time and date for the next appointment?

- YES NO

If NO, why wasn't another appointment setup? _____

Apply Step

1. When presenting the recommendation, did the recruiter have a full understanding of the benefits, entitlements or incentives the applicant wants to receive?

- YES NO

2. Did the recruiter effectively use the benefits stacking formula to present the recommendations?

- YES NO

Comments: _____



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3. Did the recruiter stress the key benefits the applicant wants to receive in order to offset the applicant's perception of commitment?

- YES NO

Comments: _____

4. Did the recruiter ask feedback questions to determine if the solution was on target?

- YES NO

Convince Step

1. Did the recruiter make an effort to provide third party testimony, social proof or offer the applicant the opportunity to talk with other satisfied applicants?

- YES NO

Tie-It-Up Step

1. Did the recruiter ask the applicant to commit at the appropriate time?

- YES NO

Comments: _____

2. If a commitment was made, did the recruiter reinforce the decision made by the applicant and agree to follow-up, etc.?

- YES: What actions were taken or promised? _____

- NO: If NO, how could it have been accomplished? _____

3. If the applicant raised objections, did the recruiter effectively acknowledge and attempt to overcome each objection?

- YES: What did the recruiter do well? _____

- NO: If NO, what could the recruiter have done better? _____



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Joint Call Audit Follow-Up Report

Recruiter: _____ Supervisor: _____ Evaluator: _____ Date: _____
Observations: Strengths: Challenges:
Recommendations:
Follow-Up/Accountabilities: Date: Actions: