

IMPACT Selling[®] Joint Call Audit

Recruiter	
Prospect	
Date	

What is your objective for this call?

Evaluation					
	Poor				Excellent
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

Evaluated by

Coaching Audit

Investigate		
1. Did the Recruiter have adequate knowledge of the prospect prior to conversation?	YES	NO
What specific information did the Recruiter have? What information did the Recruiter lack?		
How could they have done better?		
2. Did the Recruiter fully prepare for the recruiting conversation (on-time, dress, etc)?	YES	NO
Comment		

Meet		
1. Did the Recruiter issue a Statement of Intention?	YES	NO
2. Did the Recruiter develop trust and rapport early in the process?	YES	NO
If YES, what did the Recruiter do well? If NO, what could have been done better?		
3. Did the Recruiter ask for permission to ask questions?	YES	NO
4. Did the Recruiter ask for permission to record the answers?	YES	NO



Probe

1. Did the Recruiter ask questions that allowed the prospect to discover their needs and wants, discuss problems or identify solutions they're seeking?	YES	NO
If YES, what types of questions were most effective in getting the prospect to focus on specific needs?		
2. Did the Recruiter ask questions in a conversational, non-confrontational way?	YES	NO
3. Did the Recruiter avoid prematurely presenting recommendation?	YES	NO

Apply

1. If this step was not reached, did the Recruiter set a time and date for the next appointment?	YES	NO
2. Did the Recruiter have a full understanding of the prospect's objectives and the benefits the prospect wants to receive before making a recommendation?	YES	NO
3. Did the Recruiter present an effective recommendation both to and for the prospect?	YES	NO
If NO, if an effective recommendation was not presented, why was it not done? If it was not done, when should a recommendation be presented?		
4. Did the Recruiter stress the key benefits that the prospect wants to achieve?	YES	NO
5. Did the Recruiter ask feedback questions to determine if their recommendation was on target?	YES	NO
6. Did the Recruiter create sufficient value to offset the perception of price/commitment?	YES	NO
If YES, how was it done? If NO, how could it have been accomplished?		
7. Did the Recruiter present solution with confidence and no hesitation?	YES	NO



Convince

1. Did the Recruiter provide testimonials/references or offer the prospect the opportunity to talk with or meet happy, satisfied recruits?	YES	NO	N/A
2. Did the Recruiter establish movement to the next step of the recruiting process, if applicable?	YES	NO	

What is the next step?

Tie-It-Up

1. Did the Recruiter ask prospect for the commitment at the appropriate time?	YES	NO	N/A
If a commitment was made, did the Recruiter reinforce the decision made by prospect, agree to follow-up, etc.?	YES	NO	

If YES, what actions were taken? If NO, how could it have been accomplished?



Follow-Up Report

Recruiter	
Manager	
Evaluator	
Date	

Observations

Strengths

Challenges

Recommendations

Follow-Up/Accountabilities

Date

Actions