



## INBOUND SALES CALL ASSESSMENT

Salesperson/BDC Agent: \_\_\_\_\_ Date of Call: \_\_\_\_/\_\_\_\_/\_\_\_\_

Caller Name: \_\_\_\_\_ Source: \_\_\_\_\_ Final Score: \_\_\_\_\_

Scoring: For Yes/No questions, award one point for a YES or an N/A (unless specified otherwise). For Question 8, see the scoring for that question. Total possible points: 25

1. Was the salesperson/BDC agent confident and professional? YES NO
2. Did the salesperson/BDC agent sound genuinely happy? YES NO
3. Were they authentic and helpful? YES NO
4. Did they stay in control of the call? YES NO
5. Did they use an Appointment-First Approach? YES (+2) NO
6. Did they adequately address the customer's questions or objections? YES NO N/A
7. Did they secure an appointment? YES (+5) NO
8. For which day was the appointment set?
  - a. TODAY (+5)
  - b. TOMORROW (+4)
  - c. 2-3 DAYS FROM TODAY (+2)
  - d. 4 OR MORE DAYS FROM TODAY (+0)
9. Did they *avoid* asking any version of these questions?
  - a. "Do you have any questions?" YES NO
  - b. "Do you need any other information?" YES NO
  - c. "When would you like to come in?" YES NO
10. Did they gather the buyer's contact information? YES (+3) NO
11. If they failed to set an appointment, did they pivot to a proper Needs Analysis? YES NO N/A
12. If no appointment, did they at least schedule a follow-up with the prospect? YES NO N/A