



Call Debrief

CUSTOMER NAME: _____

REP NAME: _____

DATE: _____

Did you do your pre-call planning?

Was bonding and rapport established? (Not just small talk; think about DISC style.)

Did you give an Up-Front Contract (UFC), and was there clear agreement by the prospect?

What were the pains/impact uncovered?



Call Debrief *(cont'd.)*

Did you talk more than the prospect(s)?

What was the prospect's budget?

Were decision timing, other key players, and decision criteria discussed? If so, what were they?

If presenting (fulfillment), did you present to the prospect's pain and keep him/her involved?

Did you ask for the sale?

If the sale was made, did you complete the Post-Sell Step (handle buyer's remorse, ask for referrals, set expectations)?

Call Debrief *(cont'd.)*

What is the clear next step (commitments by you and the prospect) if the sale was not closed?

What decision did the prospect agree to make at the next meeting? (May need UFC for next meeting.)

What other key information did you uncover if the sale was not closed?

What key information did you overlook that you need to get during the next contact?

Overall, what did you do well?

Where could you improve? (Lessons learned)
