

Student/Code: _____

Evaluator Number: _____

Grading Scale – 100 Total Points Possible

0 = Not Present, 1-2 = Poor, 3-4 = Fair, 5-6 = Good, 7-8 = Very Good, 9-10 = Excellent

Approach <ul style="list-style-type: none"> Professional introduction Appropriate dress and appearance Quickly builds rapport and engages the prospect Smoothly transitions into needs identification 	Overall Score 0 1 2 3 4 5 6 7 8 9 10	Feedback
Value Statements <ul style="list-style-type: none"> Provides value statements relevant to the customer's preferences Shares the value of State Farm and the agent/team 	Overall Score 0 1 2 3 4 5 6 7 8 9 10	Feedback
Identify Needs <ul style="list-style-type: none"> Asks questions and/or validation of pre-call information to better understand the customer's needs Helps the prospect recognize additional needs that exist throughout the conversation using probing questions 	Overall Score 0 1 2 3 4 5 6 7 8 9 10 0 1 2 3 4 5 6 7 8 9 10	Feedback
Presentation of the quote <ul style="list-style-type: none"> The quote is presented in a professional manner, displaying subject-matter expertise. Presentation of the quote is logical, well-practiced, and persuasive. Explains solutions for the customer articulating the benefits that best align with the customer's needs Uses probing to assess prospect's reactions (verbal & non-verbal) to determine when the prospect is satisfied and/or ready to purchase 	Overall Score 0 1 2 3 4 5 6 7 8 9 10 0 1 2 3 4 5 6 7 8 9 10 0 1 2 3 4 5 6 7 8 9 10	Feedback
Response to Customer Concerns <ul style="list-style-type: none"> Takes the time to clearly understand customer's concerns and clarifies, when needed, before responding Uses appropriate response techniques to address customer's concerns Confirms when/if concerns are answered. Asks questions after responding to ensure the concern was addressed to the prospect's satisfaction 	Overall Score 0 1 2 3 4 5 6 7 8 9 10	Feedback
Closing <ul style="list-style-type: none"> Uses effective closing techniques and asks for an appropriate commitment from the prospect Confirms customer's choice and closes the sale Asks for referrals 	Overall Score 0 1 2 3 4 5 6 7 8 9 10	Feedback
Communication Strategy <ul style="list-style-type: none"> Uses professional language, avoiding filler words. Maintains a good tone and variation in pitch Displays active listening skills: does not interrupt, asks relevant follow-up questions, and welcomes prospect engagement in the conversation Good non-verbal communication: eye contact, hand gestures, etc. Shows enthusiasm and engagement, and exudes confidence in their approach 	Overall Score 0 1 2 3 4 5 6 7 8 9 10	Feedback
Total Score _____/100	Overall Feedback	