

Student Salesperson/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

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