

Rubric Template

Criterion (Score 0 if element is absent)	Below Expectations (1)	Meets Expectations (2)	Exceeds Expectations (3)	Score
Intro/Rapport	Called more than 5 minutes late with no notification beforehand, jumped straight into call with no time spent on rapport.	Called late with notification text/email sent beforehand, spent a couple of minutes on rapport.	Called at exact appointment time, confirmed, prospect name, spent 3-5 minutes on building rapport.	
Setting Expectations	Did not address Who? What? Where? When? Why? How? Did not establish the PROMISE, takeaway, confirm permission.	Only set some of the expectations, did not make promise, or get confident permission from lead.	Set expectations: What we're going to talk about? For how long? Who needs to be on the call? Why we're having the call? Promise to determine fit, takeaway if not a fit, confirm permission to proceed with call.	
Deep Dive/Uncover	Skipped entirely or took a shortcut through the process, deviated from script questions/asked irrelevant questions, or repeated questions; no active listening back or recap.	Descriptions of expectations for this criterion for the assignment	Spent as long as necessary to dig out emotion from the prospect, asked a minimum of 10 questions, (surface, logic, emotion, consequence, financial), active listened back, asked clarifying questions. Drew contrast between life now and life w/ product.	
Presentation/Pricing	Brief overview; displayed little knowledge of product; lack of clarity in results; did not appropriately match product solutions to prospect problems.	Verbal brochure, adequately covered product but presentation lacked clarity. Presented too early i.e. before deep dive.	Dedicated time to presentation; did not regurgitate script but instead highlighted features that would solve prospects specific problems as stated during deep dive. Pricing was delivered after deep dive and	

			with confidence. Sale was assumed.	
Overcoming Objections	Did not attempt to overcome objections OR overcame objections unethically by providing false claims or promises.	Attempted to overcome objections but failed due to lack of understanding of prospects' real concerns.	Successfully overcame objections by getting to the root of the objection; which as RemoteRep teaches there are only two: trust and value.	
Tone/Cadence/Energy	Tone was not confident or lacked empathy. Cadence was too fast or too slow. Energy was lacking.	Tone was properly matched to prospects. Cadence was just right to make sure prospect was engaged. Energy was appropriate; not too excited and not too disinterested.	Tone was manipulated throughout call for the script to be delivered with maximum impact. Cadence allowed the prospect to remain engaged and hear every word clearly. Energy was high throughout call.	
Follow Up/Onboarding/Sign Off	<p>If the sale was lost; did they schedule a followup? Yes/No/When are we speaking again? Time/Date/Topic of conversation</p> <p>If sale was won; Ended call without explaining next steps or reassuring prospect on their decision.</p>	<p>If the sale was lost; scheduled a followup w/ Time/Date/Topic of conversation.</p> <p>If sale was won; explained onboarding process and next steps.</p> <p>If deposit collected; payment plan outline and followup set.</p> <p>If agreement; was it signed?</p>	<p>If the sale was lost; scheduled a followup w/ Time/Date/Topic of conversation.</p> <p>If sale was won; explained onboarding process and next steps. Reassured prospect of the decision they'd made to invest.</p> <p>If deposit collected; payment plan outlined and follow up set.</p> <p>Agreement signed?</p>	
TOTAL				/21

Notes/Feedback?