



Joint Call Worksheet

Salesperson: _____ Date: _____

Prospect or Customer: _____

Identified Opportunity: _____

Call Objective: _____

Coach's Challenge for this call: _____

Salesperson's Observations:

How did I do?

Did I meet the objectives of the call?

If not, what could have been done to reach them?

What would I have done differently?

What would I like to improve on?

Manager's Observations:

Overall call rating. Excellent Good Fair Poor

What you might have done differently.

Areas you might want to improve on.

Skills/Areas you excelled at.