

# Sales Call Scorecard

Your QA checklist for better first impressions and lasting customer relationships



D2MS

# Learn and improve with this QA checklist for your outbound sales team.

Turn first impressions into lasting connections with this simple checklist. Use it to review your sales team's calls and coach them towards real, friendly chats that create loyal customers.

## 1. Making the first connection

- Clear, engaging, and friendly greeting
- Rep advised the call was being recorded
- Rep established rapport and built a connection
- Rep matched the customer's tone and energy
- Rep gained an understanding of customer needs
- Problems, issues or challenges were uncovered

## 2. Personalising the approach

- Rep offered a personalised solution to address customer needs
- Rep addressed problems, issues, or challenges

## 3. Navigating the subscription

- Customer was instructed how to access their discount
- Customer was shown how to make changes to their order
- Customer was shown premium add ons

## 4. Sharing key details

- Price explanation was easy to understand
- Rep advised delivery date
- Rep advised payment date
- Customer was educated on how to manage their ongoing plan

## 5. Maintaining trust

- No personal information was shared
- No inappropriate language was used
- No selling to vulnerable customers was involved

## 6. Handling objections

- The rep handled objections well and effectively progressed the call

## 7. Wrapping things up

- Rep reminded customer of the discount
- Rep clearly described next steps
- Rep guided customer to the app or website

Score: / 22

## Follow our lead

Ready to deploy a dedicated team of telephone experts? We're here to act as an extension of your brand, having great conversations that help you create lasting customer relationships.

Talk to us about your lead acquisition project today!



UK: +44 7300 214 408  
AUS: +61 438 608 580



UK: [hello@d2ms.co.uk](mailto:hello@d2ms.co.uk)  
AUS: [hello@d2ms.com.au](mailto:hello@d2ms.com.au)