

Assessment Form for ICSC Warm Call - Round 1

Competitor Name _____ University _____ Buyer _____

Preliminaries

Professional Introduction – First & last name, company name

out of **5**

Build rapport – Warm up the call with a reason why you were calling

out of **5**

Demonstrate knowledge of the buyer or buyer's company

out of **5**

Transition smoothly to investigating stage with a question specific to buyer's business

out of **5**

Investigate

Determine relevant facts about the company and/or buyer

out of **5**

Uncover primary needs (cause for the initial document download and other relevant issues)

out of **10**

Demonstrate Value

Articulate Gartner's Value Proposition

out of **10**

Present a potential solution based on the needs of the buyer

out of **5**

Use at least one trial close that confirms potential client's confirmation of value

out of **5**

Objection Handling

Overcome objections using the CRC method

out of **10**

Closing

Persuasive in presenting a reason to meet with a Gartner representative

out of **10**

Ask for the face-to-face meeting, confirming DATE, TIME, and LOCATION

out of **10**

Overall

Conversational and non-scripted

out of **5**

Active listening – drew out information from prospect – repeat, rephrase, etc.

out of **5**

Clear pronunciation – no “filler” words (um, uh, like, you know) and no abstract language without explanation (great, awesome, super, etc.)

out of **5**