Sales Process Observation Form

Warmly Welcome

1. Greeted customer promptly with a smile (not behind the counter) _____/ 10
2. Exchanged names and asked what brings them in _____/ 10

Uncover Needs

3. Used qualifying questions to uncover current carrier, lines, plan details, and devices _____/ 10
4. Used qualifying questions to uncover current accessories, insurance, and bill payment method _____/ 10

Offer Solutions

5. Offered plan and phone by giving options and Top-Down Selling—4 for $100 _____/ 10
6. Used Transition Statement to get Customer into PPP application _____/ 10
7. Offered Acc Bundles and put in customers hands _____/ 10
8. Present Cricket Protect benefits and assume sale _____/ 10
9. Asked at least 3 closing questions as needed _____/ 20

Make a Friend

10. Recommended Auto Pay, gave multiple benifits _____/ 10
11. Offered to transfer contacts and setup phone _____/ 10
12. Registered My Cricket App, Sent out RAF Codes _____/ 10
13. Gave customer a great pitch about the survey _____/ 10
14. Sincerely Thanked customer and walked to and opened the door _____/ 10

Points Possible (circle) 100 / 150 Points Earned _____ Score _____%

Consultant_____ Signature_____ Date_____

Observer_____ Signature_____ Date_____