

Hello Sandy,

Welcome to Your Intake Performance Report!

This report is designed to give you a clear breakdown of how you performed across the key stages of the intake process: Discover, Demonstrating, and Drive to a Decision. Each section highlights your strengths, areas to improve, and actionable feedback to help you sharpen your skills. Think of it as your personal playbook for taking your sales game to the next level. As you go through it, focus on specific recommendations and look for patterns—those are your opportunities to grow. Let's make your next call your best one yet!

1. Discover

In the "discover" part of the call, we check if you ask relevant basic and situation questions like "What is your name?" and "What led you to contact us today?" while avoiding unnecessary questions. It also looks for problem questions like "How has this affected your daily life?" and ensures the use of Reciprocity, Liking, and Authority to build rapport and trust with the client.

- Number of Basic Questions: 1
- Number of Situation Questions: 3
- How many unnecessary questions were asked: 2
- Number of Problem Questions: 1

Triggers Of Influence most commonly used in the Discover part of the call:

- Reciprocity - Did you use it effectively?: No
- Liking - Did you use it effectively?: No
- Authority - Did you use it effectively?: No

2. Demonstrating

We look for how many implication questions were asked, like "How will this affect you long-term?" and whether the intake person amplified the problem's impact. It tracks how many implicit needs were identified and converted to explicit needs, such as "You need legal protection?" while also ensuring Liking and Commitment and Consistency were used to build rapport and align solutions.

- Number of Implication Questions: 0
- Did you amplify the implication of the problem indicated in the implication questions: No
- How many implicit needs were identified: 1
- How many of those implicit needs were you able to convert to explicit needs: 0

Triggers Of Influencers most commonly used in the Demonstrating part of a call:

- Liking - Did you use it effectively?: No
- Commitment and Consistency - Did you use it effectively?: No

3. Driving to a Decision

In the "Driving to a Decision" phase, we track how many objections were raised and addressed, how many buying questions were asked, and whether the PNC was converted to a client. It also checks for the use of Liking, Commitment and Consistency, Reciprocity, Social Proof, Authority, Scarcity, and Unity to guide the client toward making a decision.

- Number of Objections brought up by PNC: 1
- Number of Objections you addressed: 0
- How many buying questions did you ask: 1
- Were you successful in converting the PNC to a client? No

Triggers Of Influence most commonly used in the Discover part of the call:

- Liking - Did you use it effectively?: No
- Commitment and Consistency - Did you use it effectively?: No
- Reciprocity - Did you use it effectively?: No
- Social Proof - Did you use it effectively?: No
- Authority - Did you use it effectively?: No
- Scarcity - Did you use it effectively?: No
- Unity - Did you use it effectively?: No

4. Overall Observations

The intake person made a fair attempt to understand the PNC's situation and asked some basic and problem-oriented questions. However, there were a number of unnecessary questions, and the intake missed the opportunity to explore implications and convert implicit needs into explicit ones. Additionally, they ended the call without addressing the PNC's objection about payment or converting them into a client.

The Triggers of Influence were not effectively applied during this call. The intake person could have shown more empathy and built rapport to create liking and unity. Offering a consultation first might have shown reciprocity. They missed opportunities to demonstrate authority and social proof to alleviate the PNC's concerns and increase commitment and consistency. Improving in these areas could significantly enhance future interactions.

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