

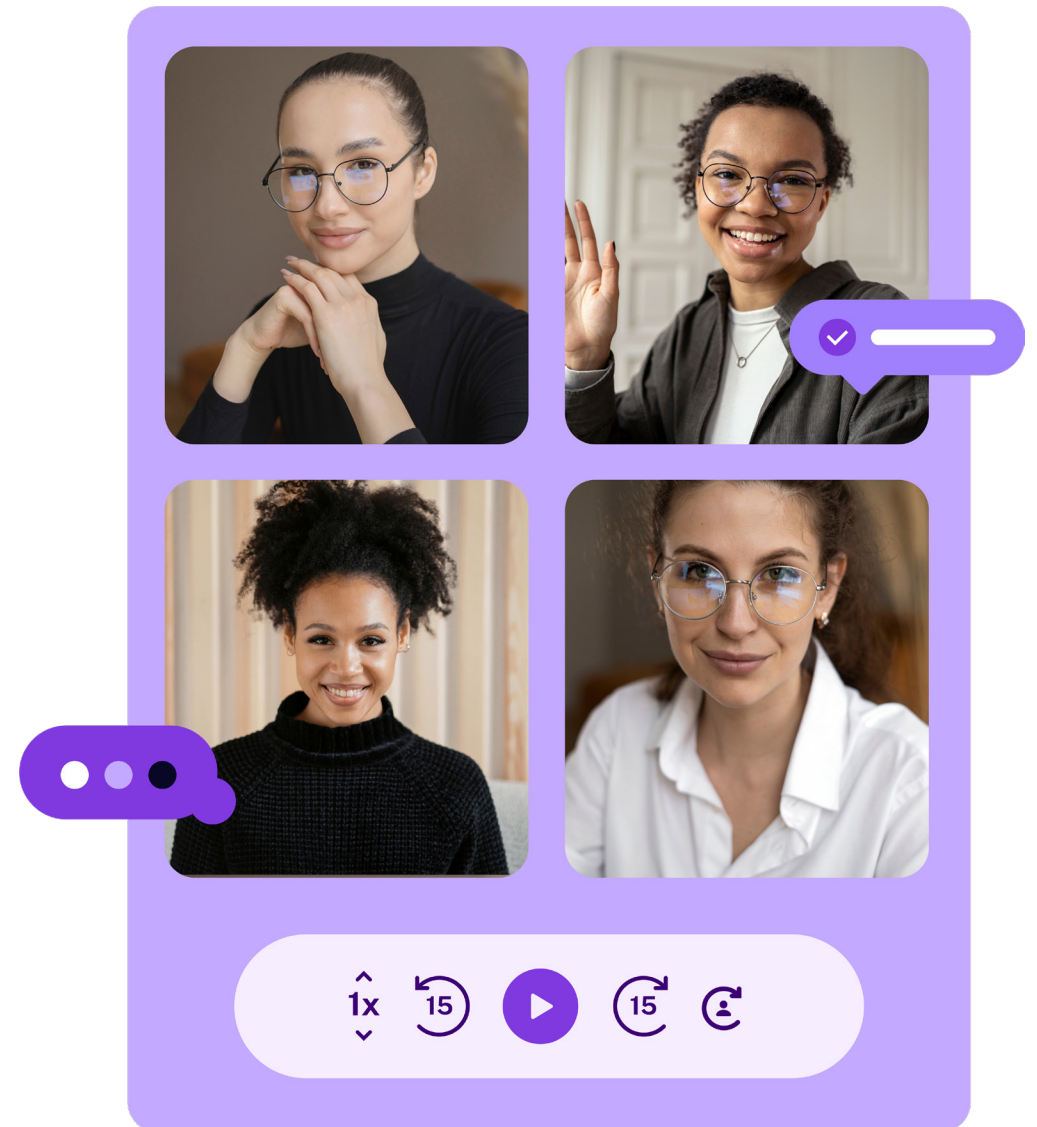
Sales coaching:

# THE ULTIMATE CALL SCORING CHECKLIST



Sales calls are the heartbeat of any revenue team. They're where value is communicated, trust is built, and deals are won or lost. But frontline managers often don't have a consistent way to evaluate these crucial moments. That's where call scoring comes in.

Call scoring identifies what reps are doing well and where they need improvement. It gives them targeted feedback on the skills — like objection handling, discovery questioning, or closing techniques — that help a deal move forward. Whether you're building a sales enablement program, coaching reps to be more effective, or just trying to align teams on what "good" looks like, a structured call-scoring framework is what gets reps to closed-won.



## Elevate rep performance with call scoring

Call scoring isn't about micromanaging or nitpicking reps. When done right, it's a powerful enabler of growth. If you're looking to level up your sales team, scoring calls is one of the best ways to enable scalable coaching and improve the performance of your reps.

It can help you:

**Coach with clarity.** Move from vague feedback to actionable insights.

**Drive consistency.** Ensure messaging and process adherence across the team.

**Spot high performers.** Identify the habits that correlate with quota-crushing performance.

**Improve ramp time.** Give new hires a clear picture of what a successful call sounds like.

**Forecast smarter.** Use call quality as a leading indicator of deal health.



There are two distinct types of scoring to apply to sales calls: Qualitative and quantitative. The first deals with the quality of each interaction, like how well the rep listened, if they built rapport, and how smoothly the conversation flowed. The second type addresses hard numbers, like how much each person spoke, how quickly the salesperson responded, and how many questions were asked.

The rubric in this guide combines these types to create a scoring system that balances structure with flexibility. You want enough consistency to compare reps and track improvement over time, but not so rigid that it ignores nuance or context.

## How to score your calls

Below is a modular checklist you can adapt based on your sales motion. Score calls across these categories using a simple scale (i.e. 1 – 5 or yes/no) and track rep performance over time:

## 1. Call preparation & research

- ✓ Was there a clear agenda set at the beginning of the call?

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- ✓ Did you demonstrate thorough preparation for the prospect?

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- ✓ Did you prepare relevant questions or insights aligned with the prospect's role and goals?

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- ✓ Did you research and use any rapport-building icebreakers?

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- ✓ Do you have a cheat sheet of your product's strengths over competitors to help you address objections?

- **Why call prep matters:** Strong openings build credibility and set the tone for a focused, productive conversation.

## 2. Rapport & relationship-building

- ✓ Was your opening friendly and engaging?

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- ✓ Did you include light social interaction to build rapport?

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- ✓ Did you clearly set expectations for the call?

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- ✓ If it was the first call, did you inquire about the prospect's previous experiences with similar solutions or their perceived needs related to the product/service?

- **Why rapport matters:** People buy from people. Building rapport creates trust, allowing reps to learn a prospect's real pain points faster.

### 3. Discovery & needs analysis

✓ Did you ask about the prospect's team structure and roles?

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✓ Did you explore how the prospect currently addresses the problems that your product or service solves?

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✓ Did you uncover key pain points with their current approach? Did you try to quantify these pains or explore their impact on the prospect's goals or operations?

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✓ Did you help the prospect envision how your product/service could solve their challenges?

✓ Did you gather detailed information about:

→ Team size, structure, and goals

→ Budget availability, decision-making processes, key decision-makers, and stakeholders

→ Current solutions (competitors, internal solutions)

→ Opportunities to involve additional teams or expand the deal

- **Why discovery matters:** Discovery is the foundation of a tailored sales process. Once reps learn more about the business and its pain points, they can customize the pitch based on the information they gather.

## 4. Pitch

- ✓ Did you complete the discovery phase before pitching solutions (i.e. avoiding “prescribing before diagnosis”) or did you alternate between discovery, objections, and pitch?
- ✓ Did you tie product capabilities to the buyer’s specific problems?
- ✓ Did you connect the prospect’s identified pains to your product or service’s features, benefits, and success stories?

### TIP!

Which key value propositions from the company’s generic pitch did the rep cover? Evaluate whether it made sense to focus on certain topics and omit others.

- **Why call pitch matters:** Generic pitches fall flat. Great reps translate features into buyer outcomes.

## 5. Objection handling & differentiation

- ✓ Highlight any explicit or implicit objections raised by the prospect.
- ✓ Were objections handled effectively, confidently, and empathetically?
- ✓ Did you highlight the company’s differentiators in response to potential competitor comparisons?
- ✓ Did you involve the prospect in objection handling (e.g., Do you agree? or How do you view this)?
- ✓ Were your responses tailored to the prospect’s specific concerns?

- **Why objection handling matters:** Objections are buying signals in disguise. If handled well, they move deals forward.

## 6. Closing & next steps

- ✓ Did you review whether the call expectations set at the beginning were met?

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- ✓ Did you secure a clearly defined next step, such as scheduling a follow-up meeting or initiating a trial?

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- ✓ Was the next step scheduled with a date and time?

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- ✓ Did you summarize the discussion effectively and refer back to the goals of the call?

- **Why next steps matter:** Generic pitches fall flat. Great reps translate features into buyer outcomes.

## 7. Communication & professionalism

- ✓ Was your tone professional, friendly, and confident?

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- ✓ How often did you interrupt the prospect?

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- ✓ Did you customize the conversation based on the prospect's specific pains and priorities?

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- ✓ Did you maintain control of the conversation while ensuring the prospect felt heard?

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- ✓ Was the call's pacing and time management in alignment with sales best practices?

- **Why professionalism matters:** A professional tone may seem like table stakes, but it's critical to get right if you want the customer to feel heard and respected, especially if you're engaging multiple stakeholders.

## 8. Overall evaluation

- ✓ Summarize the call's effectiveness, including strengths, weaknesses, and final recommendations.

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- ✓ Ensure feedback is practical and achievable. Suggest specific phrases or strategies rather than general comments.

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- ✓ Reflect on which 1–2 changes would have had the biggest impact on this conversation.

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- ✓ Suggest a concrete commitment for you to improve during your next call.

- ✓ What was the duration of your longest monologue?

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- ✓ Provide statistics on call duration, including the percentage of time spent talking by you versus the prospect.

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- ✓ Count the number of questions asked. Categorize each question as "open" or "closed" and provide the counts for each category.

## Take it a step further with AI agents

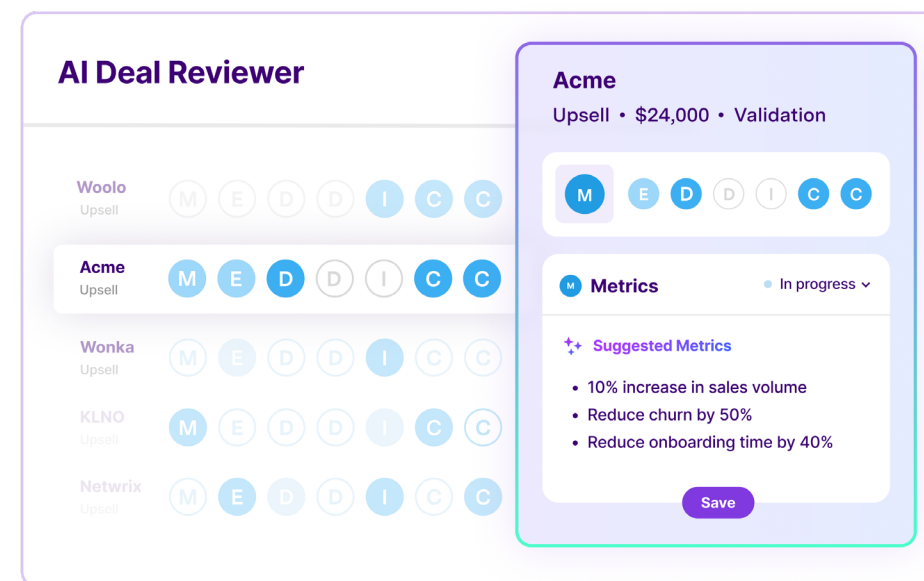
Call scoring isn't just about quality control; it's about enabling excellence. When reps know what's expected and managers have the data to coach meaningfully, everyone wins.

However, while manual scoring works well, it doesn't scale easily. That's why many modern revenue teams are turning to AI agents to automate parts of the process.

AI agents can:

- **Auto-score calls based on custom criteria**
- **Surface coachable moments**
- **Benchmark reps across teams**
- **Correlate call quality with deal outcomes**

The [Gong Revenue AI Platform](#) now has [a suite of AI agents](#) that can help you streamline call scoring while unlocking your team's potential, including:



[AI Call Reviewer](#) will assess your team's calls for you. You can either have the agent suggest answers to call review questions or automatically answer them for you, resulting in a completed review card for managers to use with their team. In both cases, the agent significantly expedites call review, unlocking a more regular cadence of performance feedback to reps and saving frontline managers time.

[AI Deal Reviewer](#) evaluates deals based on standard or customer-specific sales methodologies. Those methodologies often help to inform call-scoring rubrics, allowing frontline managers to score objectively and thus improving pipeline qualification and enhancing forecasting accuracy.

For managers who want to support reps and improve calls, AI agents are a massive productivity hack. Now you can quickly and accurately provide constructive, actionable feedback that moves the needle on deals. Over time, you'll create a culture where every conversation is a learning opportunity and every call gets a little better.

Ready to discover how you can enable your team to sell smarter and close more deals?

