

Need Discover Role Play Rubric

Approach (10%)

1. Professional Introduction - Provided name, organization, and position; used buyer's name; smiled, appropriate eye contact; enthusiastic, confident.
2. Built/Established Rapport - Raised comfort of prospect; lowered barriers; started building trust
3. Salesperson gained prospect's attention - Provided relevant value proposition (situation appropriate)
4. Set Situation Appropriate Agenda - gained commitment to continue
5. Uncovered Decision Process - Decision criteria, steps, and people involved in the decision.
6. Effectively transitioned to Needs ID.

Needs Identification (40%)

1. Uncovered basic relevant facts about the prospect's role, company, and situation.
2. Uncovered/Learned the prospect's strategic goals or mission critical objectives.
3. Uncovered basic challenges or dissatisfactions.
4. Probed further to clearly establish the problem(s) Gartner for Sales Leaders may solve.
5. Brought to buyer's attention the consequences (implications) of not fixing the problem.
6. Helped prospect monetize the implications or otherwise tie the implications to goals/objectives.
7. Reframed the problems as specific needs.
8. Had prospect prioritize the needs and provide timelines (as appropriate)
9. The salesperson confirmed the prospect's interest in learning more about viable solutions.

Presenting Solutions (20%)

1. Presented a succinct overview of potential solutions (general features and benefits).
2. Ensured prospect understood the potential value of the solutions.
3. Sales Aids - Used relevant sales aids to effectively communicate key points.
4. Effective use of trial closes.

Handling Objections (10%)

1. Clarified Objections - For each objection, asked the buyer for clarification, or paraphrased the objection to ensure mutual understanding.
2. Handled Objection – Provided convincing resolutions to the objections.
3. Confirmed Resolution – Confirmed objections have been resolved.

Gaining Commitment (15%)

1. Summarized the needs and value of the solutions
2. Made a compelling case the solutions provide a meaningful ROI and/or help the prospect achieve key strategic objectives
3. Asked for Commitment – Provided a compelling request for commitment (to the primary sales call objective).
4. Handled Response Effectively.
5. Clearly laid out appropriate "action items" and related timeline.



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Overall (5%)

1. Kept Buyer Engaged - Kept buyer's attention and interaction throughout the meeting.
2. Demonstrated Active Listening - Demonstrated an understanding of the buyer's thoughts and feelings; adjusted verbiage to fit within the context of the buyer's situation.
3. Non-verbal Communication - The salesperson maintained appropriate eye contact and presented a pleasant and professional demeanor.
4. Verbal Communication - Conversational – non-scripted – adapted to prospect - used appropriate verbiage - supported a pleasant and professional demeanor.
5. Professionalism - Salesperson projected professionalism (e.g., appearance, attitude, business acumen, confidence, demeanor, etc.)