

Agent Name: **Adam Gilchrist**

Period: **Aug 1, 2024 – Aug 31, 2024**

Scorecard Overview

Scorecard	# Total Agents	# Calls	Duration	Average Total Score	# Calls	Duration	Average Total Score
Sales Performance QM	5	36	7.9	81.13	7	10.53	84.6
Total	5	36	7.90	81.13	7	10.53	84.60

AGENT DETAILS



QA Score

85%



Agent Total Calls

7



Team Total Calls

36



Avg Talk Time (m)

10:31 mins

Summary

Adam Gilchrist demonstrates strong communication skills, consistently delivering clear explanations and maintaining a professional, empathetic tone that builds rapport effectively. His product knowledge is excellent, confidently addressing policy details and insurance processes across various call types. Objection handling is generally effective, with a high overcome rate on pricing and timing concerns, showing adaptability and customer understanding. However, closing techniques remain a notable weakness, with multiple calls showing missed opportunities to secure explicit commitments or confidently close sales. Follow-up planning is adequate but could be more proactive and clearly communicated to ensure continuity. Sales likelihood indicators reveal customer interest but hesitation, reflecting the agent's need to strengthen closing momentum. Compared to last month, Adam shows improvement in closing techniques and follow-up planning, though still below team averages in these areas. Compliance steps are mostly met, with occasional lapses in caller verification and call recording statements. Overall, Adam's performance is solid in communication and product knowledge but requires focused improvement in closing and follow-up to convert interest into sales more consistently.

Overall Performance Summary

Category	Score %	Trend vs Last @period	Team Avg	Variance to Team
AverageTalkTime	10:31 mins	+3:45 mins	7:54 mins	+2:37 mins
Call Introduction & Set-Up	95%	+1%	95%	0%
Closing Techniques	57%	+24%	69%	-12%
Discovery Process	100%	→ No change	97%	+3%
Follow-Up Plan and Compliance	79%	+4%	84%	-5%
Objection Handling	86%	+3%	82%	+4%
Product	100%	→ No change	96%	+4%
Sales Outcome	49%	+7%	49%	0%
Soft Skills & Overall Delivery	80%	→ No change	79%	+1%
QA Score	85%	-8%	85%	0%

Areas for Improvement

- Improve closing techniques by explicitly asking for commitment and confidently securing next steps, as seen in multiple calls where closing was passive or absent.
- Enhance follow-up planning by clearly outlining next steps and scheduling follow-ups to maintain momentum and customer engagement.
- Strengthen caller verification processes to ensure compliance and build trust early in the call.

Top Strengths

Effective Communication

Product Knowledge

Rapport and Empathy

Performance Trends

Adam's overall QA score is stable at 85, matching the team average but down from last month's 93, primarily due to declines in closing techniques and follow-up planning. Communication, product knowledge, and objection handling remain strong, with pass rates near or at 100%. Closing techniques improved from 33 to 57 compared to last month but still lag behind the team average of 69. Follow-up planning also improved slightly but remains below team benchmarks. Sales likelihood scores are low, indicating a gap between customer interest and conversion, linked to weaker closing and follow-up. Compliance is generally good, though caller verification occasionally fails. The agent handles objections well, especially timing and pricing, with a 100% overcome rate, indicating strong objection management skills. Performance fluctuates across call types, with service-focused calls showing less sales activity and closing opportunities. Overall, Adam is progressing but needs targeted coaching on closing and follow-up to boost sales outcomes.

OBJECTION INSIGHTS

Overcome Rates

Objection Type	Overcome
Timing/Defer	2
Pricing Query	2
Price Objection	1
Need More Information	1

Most Common Objections

Timing/Defer

Pricing Query

Price Objection

Comments

Adam effectively overcomes all common objections encountered, particularly timing and pricing concerns, demonstrating strong objection handling skills. The 100% success rate indicates the agent's ability to acknowledge and address customer hesitations promptly. However, the timing of objection handling could be improved to anticipate and manage objections earlier in the call, enhancing overall call flow and sales momentum.

Metric Breakdown

Metric	Total	Pass	Pass Rate %
Areas for Agent Improvement Identified	7	3	43%
Closing Techniques	7	4	57%
Effective Communication	7	7	100%
Follow-Up Plan	7	5	71%
Objection Handled	7	6	86%
Objection Raised	7	6	86%
Objection Timing	7	0	0%
Product Knowledge	7	7	100%
Rapport Building	7	7	100%
Sales Likelihood	7	0	0%

Note: These metrics are summarized across all scorecards including: Performance QM.

CALL HIGHLIGHTS



BEST CALL

Call Id: 172594_1 [→](#)

- Strong rapport and empathy
- clear explanation of policy renewal and agreed value adjustments
- effectively handled pricing objections
- and secured customer agreement to proceed.



COACHING CALL

Call Id: 171685_1 [→](#)

- Missed opportunities in closing techniques with passive closing and failure to verify caller identity
- resulting in delayed commitment despite customer interest.

Coaching Focus for Next Week

- Coach Adam to use assertive closing language by explicitly asking for customer commitment and confirming next steps during calls.
- Train Adam to proactively establish clear follow-up plans, including scheduling callbacks or confirming customer decision timelines to maintain engagement.
- Reinforce the importance of thorough caller verification early in the call to ensure compliance and build trust.
- Develop strategies for anticipating objections earlier in the conversation to improve timing and effectiveness of objection handling.

SAMPLE CALLS

Call Id	Media Player Link	Performance	Score
5447717	Click	Poor	76
5448031	Click	Poor	76
5449331	Click	Good	96
5449334	Click	Good	96

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