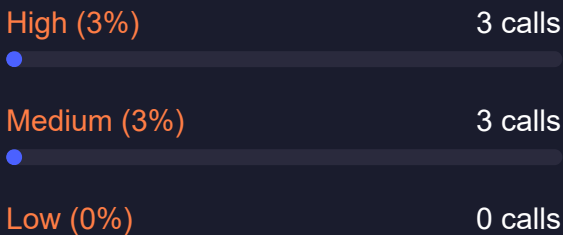


Month: **August 2024**

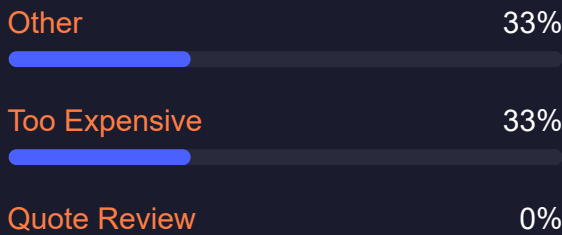
EXECUTIVE SUMMARY



Conversion Likelihood



Top No-Sale Reasons



Executive Summary

In August 2024, the outbound sales campaign demonstrated strong performance with a total of 6 calls and an estimated conversion rate of 67%, reflecting a stable and effective sales effort. High and medium sale likelihoods were evenly split, indicating balanced lead quality, while the sales effectiveness rate remained robust at 87%. Key challenges include price-related objections and eligibility concerns, each accounting for a third of no-sale reasons, signaling areas for targeted improvement. Compared to prior periods, there is a mixed trend with notable gains in closing techniques but declines in communication and rapport building, suggesting opportunities to refine agent interactions.

Sales Effectiveness Summary

Attribute	Yes %	No %	Trend vs Last Month
Effective Communication	66		-12
Rapport Building	83		-16
Closing Techniques	50		30
Follow-Up Plan	66		7
Objection Handled	100		40
Product Knowledge	100		20
Areas for Agent Improvement Identified	50		-30

Observation

Lead conversion efficiency remains solid with an 87% sales effectiveness rate, supported by strong objection handling and product knowledge scores, both at 100%. However, declines in effective communication (down 12%) and rapport building (down 16%) may be limiting overall conversion potential. The significant improvement in closing techniques (+30%) and follow-up planning (+7%) are positive developments, yet the 30% drop in identifying areas for agent improvement highlights a need for enhanced feedback mechanisms. These trends suggest bottlenecks in consistent engagement and personalized pitch delivery that, if addressed, could further optimize conversion rates.

Sale Likelihood Analysis

Score	Volume	% of Sales Calls	Trend vs Last Month
High	3	50	
Medium	3	50	
Low	0	0	

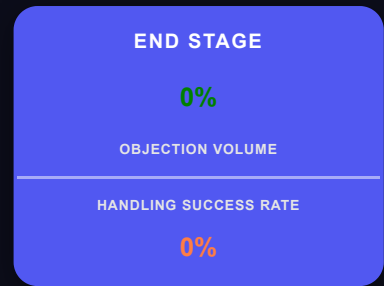
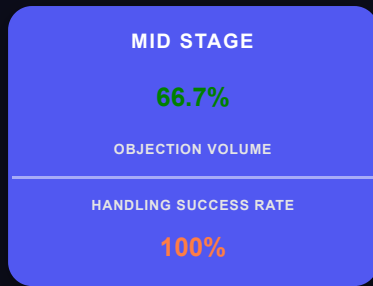
No-Sale Reasons

Reason	Count	% of No Sales Calls	Trend vs Last Month
Too expensive	2	33.3	13.7
Eligibility	2	33.3	13.7

Observation

The primary drivers behind lost sales were pricing concerns and eligibility issues, each accounting for approximately one-third of no-sale calls and showing a 13.7% increase from last month. These recurring root causes highlight critical areas for targeted training and process refinement, particularly around pricing transparency and eligibility criteria communication. No new or emerging no-sale patterns were identified, underscoring the importance of addressing these persistent challenges to reduce lost opportunities.

Objection Timing



Objection Type Distribution

Category	Occurrences	% of Sales Calls	Handling Success Rate
Price Variation	1	16.7	100
Not Relevant / Wrong Fit	1	16.7	100
Need More Information	1	16.7	100
Timing/Defer	1	16.7	100
Internal Approval	1	16.7	100
Overwhelmed / Too Busy	1	16.7	100

Observation

Price variation emerged as the most common objection theme, alongside diverse concerns including relevance, information needs, timing, internal approvals, and customer busyness, each representing equal call proportions (16.7%). Agents demonstrated exemplary handling success, achieving a 100% resolution rate across all objection categories, indicating strong objection management skills. Despite this, price-related objections remain a key barrier to conversion, suggesting a need for enhanced pricing communication strategies to preempt and mitigate these concerns more effectively.

COACHING & QA OPPORTUNITIES

Area

- Enhancing effective communication and rapport building skills
- Improving feedback mechanisms to better identify agent improvement areas
- Strengthening pricing objection handling and eligibility explanation

Recommendation

- Implement targeted role-playing sessions focused on active listening and personalized engagement
- Establish regular QA reviews with actionable feedback loops to support continuous agent development
- Develop clear, concise pricing and eligibility scripts to proactively address common objections

Thank You
for Choosing



Transform Conversations into Actionable Insights