

AGENT SALES PERFORMANCE REPORT

Agent Name: **Adam Gilchrist**

Period: **Mar 1, 2026 - Mar 31, 2026**

Scorecard Overview

Scorecard	# Total Agents	# Calls	Duration	Average Total Score	# Calls	Duration	Average Total Score
Sales Performance QM	3	18	8.21	82.63	5	9.43	87.58
Total	3	18	8.21	82.63	5	9.43	87.58

AGENT DETAILS



QA Score

88%



Agent Total Calls

5



Team Total Calls

18



Avg Talk Time (m)

9:25 mins

Summary

Adam Gilchrist demonstrates strong performance in communication quality, rapport building, and product knowledge, consistently passing these metrics across all calls. He effectively handles objections with a 100% overcome rate, showing confidence and empathy throughout interactions. However, closing techniques and sales likelihood indicators reveal room for improvement, with only 60% pass rate in closing and 0% pass in sales likelihood, indicating missed opportunities to secure firm commitments. Follow-up planning is generally solid at 80% pass but occasionally lacks proactive scheduling or reminders. Compared to last month, Adam shows improvement in closing techniques (60% vs 30%) and objection handling (100% vs 85%), while maintaining high discovery and product knowledge scores. Against the team average, he performs well in discovery, objection handling, and product knowledge but slightly below in call introduction and closing techniques. Compliance steps are mostly adhered to, though caller verification was missed in some outbound calls. Overall, Adam maintains momentum with strong soft skills and communication but should focus on enhancing closing effectiveness and follow-up rigor to convert interest into sales.

Overall Performance Summary

Category	Score %	Trend vs Last @period	Team Avg	Variance to Team
AverageTalkTime	9:25 mins	+1:18 mins	8:12 mins	+1:13 mins
Call Introduction & Set-Up	87%	-6%	96%	-9%
Closing Techniques	60%	+30%	59%	+1%
Discovery Process	100%	+3%	100%	0%
Follow-Up Plan and Compliance	90%	+5%	78%	+12%
Objection Handling	100%	+15%	80%	+20%
Product	100%	+10%	85%	+15%
Sales Outcome	48%	+8%	44%	+4%
Soft Skills & Overall Delivery	80%	→ No change	81%	-1%
QA Score	88%	-5%	81%	+7%

Areas for Improvement

- Improve closing techniques by actively confirming customer commitment and reinforcing benefits, as seen in multiple calls where closing was passive or incomplete.
- Enhance follow-up planning by proactively scheduling callbacks or reminders to revisit prospects, especially after deferred decisions or pending license upgrades.
- Strengthen caller verification processes in outbound calls to ensure compliance and build trust, as lapses were noted in some interactions.

Top Strengths

Product Knowledge

Objection Handling

Rapport Building

Performance Trends

Adam's performance shows consistent excellence in discovery, product knowledge, and objection handling, with 100% pass rates in these areas. Closing techniques have improved significantly from last month (60% vs 30%) but still lag behind team averages. Follow-up planning is strong but occasionally inconsistent, with some calls lacking explicit next steps. Communication clarity and rapport are consistently high, contributing to positive customer experiences. Sales likelihood remains a challenge, with no calls passing this metric despite positive indicators, suggesting a gap between interest generation and closing. Compliance is generally met, though caller verification failures in outbound calls highlight an area needing attention. Overall, Adam is trending positively with momentum in key QA categories but must focus on converting engagement into sales.

OBJECTION INSIGHTS

Overcome Rates

Objection Type	Overcome
Timing/Defer	2
Price Variation	1
Price Objection	1
Pricing Query	1

Most Common Objections

Timing/Defer

Price Variation

Price Objection

Comments

Adam consistently overcomes objections related to timing and pricing with a perfect success rate, demonstrating strong objection handling skills. The objections typically arise early in calls and are addressed with clear explanations and empathy. Despite this, the transition from objection handling to closing is an area where momentum is lost, as reflected in low sales likelihood scores.

Metric Breakdown

Metric	Total	Pass	Pass Rate %
Closing Techniques	5	3	60%
Sales Likelihood	5	0	0%
Objection Handled	5	5	100%
Objection Raised	5	5	100%
Product Knowledge	5	5	100%
Objection Timing	5	0	0%
Areas for Agent Improvement Identified	5	2	40%
Follow-Up Plan	5	4	80%
Rapport Building	5	5	100%
Effective Communication	5	5	100%

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

CALL HIGHLIGHTS



BEST CALL

Call Id: 182543_1 [👉](#)

- Strong rapport
- effectively handled pricing objections
- clearly communicated policy details
- and successfully guided customer to payment completion.



COACHING CALL

Call Id: 182546_1 [👉](#)

- Missed opportunity to verify caller identity
- lacked proactive closing and follow-up planning
- resulting in deferred customer decision.

Coaching Focus for Next Week

- Train on active closing strategies including confirming customer commitment and reinforcing benefits to secure firm sales.
- Implement structured follow-up protocols such as scheduling callbacks or reminders to maintain engagement and drive conversions.
- Reinforce the importance of verifying caller identity and policy details in all outbound calls to ensure compliance and build trust.
- Conduct role-play scenarios focusing on verification steps to embed consistent compliance behaviors.

SAMPLE CALLS

Call Id	Media Player Link	Performance	Score
5458301	Click	Good	96
5458304	Click	Poor	74
5458668	Click	Poor	80
5459602	Click	Good	96

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