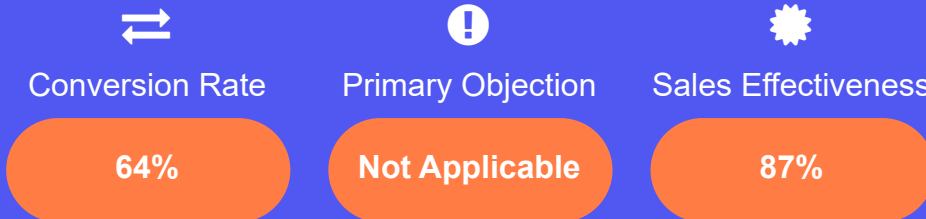
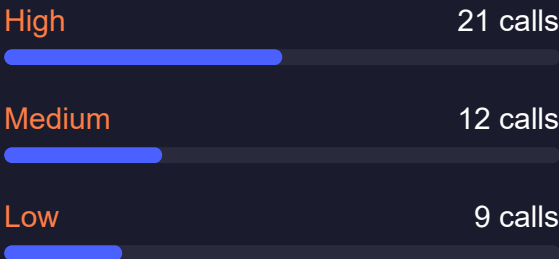


Month: **March 2026**

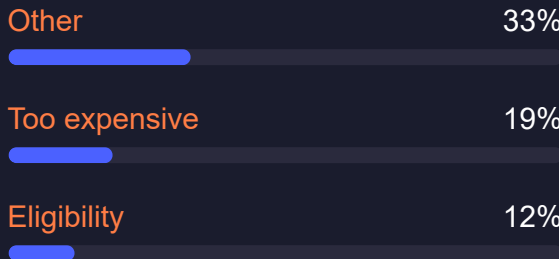
## EXECUTIVE SUMMARY



### Conversion Likelihood



### Top No-Sale Reasons



### Executive Summary

In March 2026, the outbound sales campaign conducted 42 calls with an estimated conversion rate of 64%, reflecting a stable and strong sales effectiveness rate of 87%. High likelihood calls accounted for half of the total, indicating focused targeting and effective lead qualification. While rapport building and product knowledge showed notable improvements, areas such as effective communication and agent improvement identification saw slight declines, suggesting opportunities for refinement. The predominant no-sale reasons centered around 'Other' factors and pricing concerns, highlighting areas for strategic attention moving forward.

## Sales Effectiveness Summary

Attribute	Yes %	Trend vs Last Month
Effective Communication	80	-2
Rapport Building	90	8
Closing Techniques	47	3
Follow-Up Plan	76	7
Objection Handled	71	2
Product Knowledge	97	8
Areas for Agent Improvement Identified	69	-5

### Observation

Lead conversion remained efficient with an 87% sales effectiveness rate, supported by strong gains in rapport building (+8%) and product knowledge (+8%) compared to last month. However, effective communication dipped slightly by 2%, and the identification of agent improvement areas decreased by 5%, indicating potential bottlenecks in consistent messaging and self-assessment. Closing techniques and follow-up plans showed positive trends, suggesting growing proficiency in finalizing sales and maintaining engagement. Aligning QA scores with these behavioral trends can help address inconsistencies in pitch delivery and script adherence.

## Sale Likelihood Analysis

Score	Volume	% of Sales Calls	Trend vs Last Month
High	21	50	1.3
Medium	12	28.6	-2.9
Low	9	21.4	1.6

## No-Sale Reasons

Reason	Count	% of No Sales Calls	Trend vs Last Month
Too expensive	8	19	1.1
Eligibility	5	11.9	-0.3
Self-service preference	3	7.1	-3.4
Quote review	3	7.1	-15.2
Renewal or contract date	3	7.1	2.6
Technical	3	7.1	4.1
Shopping around	2	4.8	1.8
No Budget / Financial Constraints	1	2.4	2.4

## Observation

Pricing remains the leading no-sale driver, with 'Too expensive' cited in 19% of lost opportunities and showing a slight upward trend. Eligibility issues and preferences for self-service also contributed notably, though with minor declines. Emerging patterns include technical concerns and contract timing, each accounting for 7% of no-sales and trending upwards, suggesting areas for process refinement. Addressing these root causes through targeted training and clearer communication around pricing and eligibility criteria can reduce lost opportunities.

# Objection Timing



## Objection Type Distribution

Category	Occurrences	% of Sales Calls	Handling Success Rate
Not Applicable	8	19	0
Timing/Defer	8	19	100
Price Objection	8	19	87.5
Pricing Query	6	14.3	100
Not Relevant / Wrong Fit	3	7.1	66.7
Need More Information	2	4.8	100
Internal Approval	2	4.8	50
Status Quo	2	4.8	100
Price Variation	1	2.4	100
Data Security / Compliance	1	2.4	0
Overwhelmed / Too Busy	1	2.4	100

## Observation

The most frequent objections were 'Not Applicable' and 'Timing/Defer', each occurring in 19% of calls. Agents demonstrated strong handling success with timing and pricing-related objections, achieving up to 100% success rates in categories like 'Timing/Defer' and 'Pricing Query'. However, 'Not Applicable' objections had a 0% handling success rate, indicating a critical area where objections are not being effectively addressed. Price objections also remain significant but are managed well with an 87.5% success rate. Improving strategies to reframe or preempt 'Not Applicable' objections could unlock additional conversions.

# COACHING & QA OPPORTUNITIES

## Area

- Enhancing effective communication to improve clarity and engagement.
- Developing strategies to better handle 'Not Applicable' objections.
- Strengthening agent self-assessment and continuous improvement practices.

## Recommendation

- Implement role-playing sessions focused on objection reframing, especially for 'Not Applicable' scenarios.
- Introduce targeted workshops to reinforce consistent messaging and script adherence.
- Establish regular feedback loops incorporating QA scores to identify and act on individual agent development needs.

Thank You  
for Choosing



Transform Conversations into Actionable Insights