

2026 OCSC – Round 1 Role Play

Client Needs Assessments

Directions: Please rate the quality of the role play in each of the following areas on a scale of 1-10, with 1 being Needs Improvement, 5 being Average, and 10 being Outstanding.

I. Introduction and Building Rapport (total weight: 5%)

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|---|-------------|
| 1. Professional introduction | Score _____ |
| 2. Began to build genuine rapport and trust | Score _____ |
| 3. Clear, concise explanation of the goals of the meeting | Score _____ |
| 4. Projected “likeability” | Score _____ |

II. Preparedness, Communication, and Professionalism: (total weight 45%)

- | | |
|--|-------------|
| 1. Demonstrated appropriate industry knowledge | Score _____ |
| 2. Demonstrated prior research of the client and their firm | Score _____ |
| 3. Asked good thought-provoking questions | Score _____ |
| 4. Effective speaking and appropriate grammar skills | Score _____ |
| 5. Professional dress and demeanor | Score _____ |
| 6. Active listening with good eye contact and non-verbal communication | Score _____ |

III. Needs Identification: (total weight 45%)

- | | |
|---|-------------|
| 1. Uncovered the decision process (decision criteria, people involved in decision process, potential timing issues) | Score _____ |
| 2. Effectively determined relevant facts about company and buyer | Score _____ |

3. Effectively gained a basic understanding of the prospect's problems and/or challenges Score _____
4. Demonstrated a basic understanding of the industry throughout Needs Identification process Score _____
5. Explored the effect of the prospects problems/challenges (i.e., implications) and the gains made if the problem / challenge is fixed (i.e., Need Payoff) Score _____
6. Summarized the problems/issues uncovered and gained a pre-commitment to consider the product/service Score _____

IV. Securing the follow-up appointment: (total weight 5%)

1. Provided a compelling reason to meet Score _____
2. Create sense of urgency to meet Score _____
3. Schedule a specific follow up appointment Score _____