

## **2022 OCSC – Round 2**

### **The Follow Up Needs Analysis**

*Directions: Please rate the quality of the introduction in the following areas with 1 being Needs Improvement, 5 being average, and 10 being outstanding.*

#### **I. Introduction:** (total weight: 10%)

- |   |             |
|---|-------------|
| 1. Professional introduction                              | Score _____ |
| 2. Built genuine rapport                                  | Score _____ |
| 3. Clear, concise explanation of the goals of the meeting | Score _____ |

#### **II. Preparedness & Professionalism:** (total weight 20%)

- |  |             |
|--|-------------|
| 1. Demonstrated appropriate industry knowledge       | Score _____ |
| 2. Demonstrated prior research on client's firm      | Score _____ |
| 3. Prepared good thought-provoking questions         | Score _____ |
| 4. Effective speaking and appropriate grammar skills | Score _____ |
| 5. Professional dress and demeanor                   | Score _____ |
| 6. Good eye contact and non-verbal communication     | Score _____ |

**III. Needs Identification:** (total weight 50%)

1. Uncovered decision process (decision criteria, people involved in decision process, potential timing issues) Score \_\_\_\_\_
2. Effectively determined relevant facts about company and/or 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 (implication) and the gains made if the problem / challenge is Fixed (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 20%)

1. Created a compelling reason to meet Score \_\_\_\_\_
2. Create sense of urgency to meet Score \_\_\_\_\_
3. Scheduled a specific follow up appointment Score \_\_\_\_\_