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Kopp Meeting Scorecard™ Overview

- 6 main “evaluation categories” with corresponding “evaluation items” for each.
- Seller and Manager each fill out a Kopp Scorecard™ for the evaluated meeting.
- For each item, evaluator will check “completed,” “not completed,” or “not applicable.”
- Evaluator will also provide remarks, where applicable, with additional explanation/guidance on performance improvement.
- Remarks should include applauding exceptional performance.
- Each seller should aim for 19-24 positive checkmarks indicating they are preparing for, executing and following up on meetings in a way which maximizes meeting outcomes. (Note: opportunities can be lost with certain key evaluation items. The closer the seller is to 24 checkmarks, the more likely he/she is getting maximum outcomes from meetings).
- We have provided an evaluation summary on the last page for final thoughts on the seller’s overall performance. Improvement actions and dates should be set and agreed to on this page.
- The Kopp Meeting Scorecard™ is a self measurement and management tool. It helps sellers and managers measure adoption of the behaviors needed in consultative selling. It also serves as a reminder of what actions should be taken for EVERY meeting (not just ones they’re being evaluated on).

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Evaluation Category	❑ Evaluation Item	Completed	Not Completed	Not Applicable	Remarks
Meeting Prep	❑ Submitted/filled out Kopp Meeting Planning Form prior to meeting				
	❑ Researched prospect, company, industry (background)				
	❑ Prepared 3-4 “High Gain” questions (to open the meeting)				
	❑ Identified prospect’s objective and seller’s objective for the meeting				
	❑ Had useful visual aids ready				
	❑ Identified potential objections and best answers				
	❑ Planned meeting flow based on time allocated and scenarios for more or less time				
	❑ Confirmed meeting 1 day prior reminding prospect why meeting is of benefit to him/her				
TOTALS					**Total completed out of all applicable:**

Seller:

Evaluator:

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Evaluation Category	❑ Evaluation Item	Completed	Not Completed	Not Applicable	Remarks
Engaged Prospect(s)	❑ Used high gain questions early in the discussion to learn more about prospect's role, potential needs and approval process				
	❑ Guided prospect through Conversation Funnel				
	❑ Engaged in conversation Ping-Pong				
	❑ Used active listening skills to pinpoint/uncover/create areas of opportunity based on prospect's comments, further qualified with follow up questions				
Meeting Etiquette	❑ Didn't talk over other people				
	❑ Exhibited politically correct behavior				
	❑ Didn't use speakerphone				
	❑ Respected prospect's time – arrived on time, asked at beginning of meeting how much time is available and stuck to it (unless prospect asked for more time)				
TOTALS					Total completed out of all applicable:

Seller:

Evaluator:

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Evaluation Category	❑ Evaluation Item	Completed	Not Completed	Not Applicable	Remarks
Meeting Flow	❑ Went “off-script” when needed				
	❑ Stayed focused on relevant topics				
	❑ Properly managed time to accomplish set objectives				
Objections Handling	❑ Successfully overcame prospect objections				
	❑ Used techniques like sharing relevant success stories, stats, asking more questions				
Meeting Close	❑ Secured next step, DATE & TIME & understood what the right next steps should be				
	❑ Sent thank you email to prospect within 24 hrs. of the meeting. Sent follow up items on the promised date.				
	❑ Entered detailed notes with next steps into CRM (i.e. Salesforce.com)				
TOTALS					**Total completed out of all applicable:**

Seller:

Evaluator:

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Accountability Summary

Meeting Specifics:

- Company name:
- Prospect's name and title:
- Date of meeting:
- Seller:
- Evaluator:

What went well in the meeting?

What areas need improvement?

Actions to be taken as a result of evaluation:

Date for Action: