**Section 1: Core Communication Fundamentals (Applicable to ALL Conversations)**

| **Behavior/Skill** | **Score** | **Detailed Breakdown of Behavior for Score** |
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| 1.1 Rapport Building & Sincerity&lt;br>\*(Observable Indicators: Established a positive tone. Showed genuine interest/empathy. Adapted communication style appropriately. Used positive non-verbal cues like tone and pace.)\* | **5** | AM effortlessly created a warm, positive atmosphere. Showed deep, authentic empathy, making the client feel truly understood and valued. Seamlessly adapted their style, language, and pace to perfectly match the client. Non-verbals (tone, pace) strongly reinforced connection. Client was highly engaged and open. |
|  | **4** | AM established a positive tone and showed clear interest and empathy. Communication style was appropriate for the client. Non-verbals were positive and supportive. Client was comfortable and engaged. |
|  | **3** | AM attempted to build rapport, but it felt somewhat formulaic or inconsistent. Empathy was expressed but perhaps not fully conveyed. Tone was generally positive but with occasional lapses. Some adaptation in style was noted, but not consistently. Client engagement was adequate. |
|  | **2** | Little attempt to establish a positive tone or show empathy. Communication style was largely one-size-fits-all. Tone might have been neutral, indifferent, or slightly negative. Client seemed disengaged or purely transactional. |
|  | **1** | AM's approach was perceived as insincere, dismissive, or negative. Tone was inappropriate (e.g., impatient, condescending). Created awkwardness or a negative atmosphere, damaging the interaction. |
| 1.2 Active Listening&lt;br>\*(Observable Indicators: Allowed speaker to talk without undue interruption. Used paraphrasing/summarizing to confirm understanding (Echo & Summarize). Asked relevant clarifying questions.)\* | **5** | AM listened intently, rarely interrupted, and when they did, it was to constructively clarify or guide. Expertly used paraphrasing and summarizing, leading to profound mutual understanding. Clarifying questions were insightful and uncovered deeper needs/information. |
|  | **4** | AM listened attentively with minimal interruptions. Effectively used paraphrasing/summarizing to ensure understanding was accurate. Asked relevant clarifying questions that aided comprehension. |
|  | **3** | AM generally listened but interrupted unnecessarily at times or seemed to be waiting for their turn to speak. Attempted paraphrasing/summarizing but it was sometimes inaccurate or missed key points. Clarifying questions were basic or sometimes off-topic. |
|  | **2** | AM frequently interrupted or talked over the client. Little to no use of paraphrasing/summarizing. Did not ask clarifying questions, or questions showed a lack of attention. Missed key information shared by the client. |
|  | **1** | AM clearly did not listen, ignored client statements, or responded inappropriately due to inattention. Paraphrasing/summarizing, if attempted, was completely inaccurate and caused confusion. |
| 1.3 Professionalism & Tone&lt;br>\*(Observable Indicators: Maintained a professional, respectful, and helpful tone throughout. Language used was clear, concise, and appropriate.)\* | **5** | AM consistently projected exceptional professionalism, respect, and helpfulness. Tone was perfectly modulated for the situation, inspiring confidence. Language was articulate, precise, and highly effective. |
|  | **4** | AM consistently maintained a professional, respectful, and helpful tone. Language was clear, concise, and appropriate for the client and situation. |
|  | **3** | AM was generally professional, but there were minor lapses in tone (e.g., slightly too casual, a hint of impatience) or language (e.g., minor jargon use, slightly unclear). |
|  | **2** | AM displayed unprofessional behavior at times. Tone was inconsistent, occasionally disrespectful, or unhelpful. Language was sometimes unclear, inappropriate, or overly technical for the client. |
|  | **1** | AM was unprofessional, disrespectful, or unhelpful. Tone was consistently inappropriate (e.g., condescending, aggressive, dismissive). Language was confusing or offensive. |
| 1.4 A.C.E. Framework (for structured interactions)&lt;br>\*(Observable Indicators: Appreciate: Expressed appreciation. Check time: Confirmed allocated time. End Goal: Clearly stated and verified meeting's purpose/objective.)\* | **5** | AM seamlessly and sincerely executed all A.C.E. components. Appreciation felt genuine. Time check was natural. End goal was exceptionally clear, client-focused, and enthusiastically agreed upon, setting a strong positive direction. |
|  | **4** | AM clearly and effectively executed all A.C.E. components. Appreciation was expressed. Time was confirmed. End goal was stated clearly and client confirmed understanding/agreement. |
|  | **3** | AM attempted all A.C.E. components, but one or more felt rushed, unclear, or formulaic. For example, end goal stated but no clear client agreement sought, or appreciation sounded like a script. |
|  | **2** | AM missed one or more A.C.E. components, or execution was very poor (e.g., mumbled appreciation, no time check, vague end goal). Led to a lack of clarity or direction at the start. |
|  | **1** | AM completely failed to apply the A.C.E. framework or did so in a way that was confusing or negative (e.g., stated an end goal that was entirely misaligned with the client's understanding). |
| 1.5 Clarity of Next Steps (Overall)&lt;br>\*(Observable Indicators: If any follow-up was implied or agreed, were clear next steps defined and ownership assigned?)\* | **5** | AM proactively summarized all agreed actions, assigned ownership with timelines with exceptional clarity, and confirmed mutual understanding, ensuring no ambiguity and strong momentum. |
|  | **4** | AM clearly defined all agreed next steps, assigned ownership, and confirmed understanding. |
|  | **3** | AM mentioned next steps, but they were somewhat vague, ownership was unclear, or confirmation of understanding was missed. |
|  | **2** | No clear next steps were defined despite the conversation requiring them, or steps mentioned were confusing and lacked ownership. |
|  | **1** | AM created confusion about next steps or set incorrect expectations that could lead to future issues. |

**Section 2: Consultation & Pitching Focus**

| **Behavior/Skill** | **Score** | **Detailed Breakdown of Behavior for Score** |
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| 2.1 Needs Discovery (e.g., S.P.I.N.)&lt;br>\*(Observable Indicators: Applied Situation, Problem, Implication, Need-Payoff questions. Adapted questioning flexibly.)\* | **5** | AM masterfully navigated through S.P.I.N. (or similar discovery framework), asking insightful, layered questions that uncovered latent needs and their profound business implications. Questions flowed naturally and were perfectly adapted to client responses, leading to strong client articulation of value. |
|  | **4** | AM effectively applied S.P.I.N., asking relevant questions for each stage. Successfully uncovered explicit client problems and implications, and client acknowledged the need/value of a solution. Questioning was mostly flexible. |
|  | **3** | AM attempted S.P.I.N. but questioning was somewhat rigid or missed opportunities for deeper probing. May have focused more on Situation/Problem and less on Implication/Need-Payoff. Some needs uncovered but perhaps not the full extent or impact. |
|  | **2** | AM followed a script-like approach to S.P.I.N. without adapting to client responses, or only touched on one or two stages superficially. Failed to uncover significant problems or implications. Client did not clearly articulate a need. |
|  | **1** | AM’s questioning was interrogative, irrelevant, or confusing, failing to build understanding or identify any real needs. May have damaged rapport. |
| 2.2 Value Reinforcement&lt;br>\*(Observable Indicators: Connected product capabilities to client business outcomes. Quantified ROI. Used client's metrics. Used case studies.)\* | **5** | AM exceptionally articulated value by seamlessly weaving product capabilities into the client’s specific strategic objectives and quantifiable business outcomes. Expertly used client’s own metrics and powerful, highly relevant case studies to make an undeniable ROI case. |
|  | **4** | AM clearly connected product features to specific client benefits and business outcomes. Attempted to quantify ROI where appropriate and used relevant examples or case studies effectively. |
|  | **3** | AM mostly discussed features but made some connections to client benefits. Quantification of ROI was vague or absent. Case studies, if used, were generic or not strongly linked to the client's situation. |
|  | **2** | AM focused almost entirely on features and functions, with little or no attempt to explain client-specific benefits or value. No discussion of ROI or relevant outcomes. |
|  | **1** | AM’s explanation of product/service was confusing or focused on irrelevant features, leading to a perception of poor value or misalignment. |
| 2.3 Solution Articulation & Personalization&lt;br>\*(Observable Indicators: Proposed solution addressed diagnosed needs. Clearly articulated "so what?". Tailored demo/discussion.)\* | **5** | AM presented a highly tailored solution that perfectly addressed the client's nuanced, diagnosed needs. Articulation of the "so what?" for each component was compelling and client-centric. Any demo was exceptionally personalized and resonated strongly. |
|  | **4** | AM proposed a solution that clearly addressed the client’s diagnosed needs. Effectively articulated the relevance and benefits of the solution components. Demo/discussion was well-tailored to the client. |
|  | **3** | AM proposed a solution that generally addressed client needs but lacked some personalization or depth in explaining the "so what?". Demo/discussion had some generic elements. |
|  | **2** | AM proposed a generic solution that didn't fully align with the client's specific diagnosed needs, or the articulation was unclear. Demo/discussion felt like a standard pitch. |
|  | **1** | AM proposed an inappropriate or irrelevant solution, showing a misunderstanding of client needs, or the articulation created confusion/distrust. |
| 2.4 Objection Handling&lt;br>\*(Observable Indicators: Acknowledged & Empathized. Clarified. Reframed. Validated/Proposed Solution.)\* | **5** | AM welcomed objections as opportunities. Masterfully Acknowledged, Clarified root causes with insightful questions, Re-framed compellingly around value, and Validated resolution confidently. Turned significant objections into stronger positioning. |
|  | **4** | AM effectively followed the A.C.R.V. process for objections. Remained composed, clarified concerns, reframed effectively by focusing on value, and proposed appropriate solutions/next steps. |
|  | **3** | AM attempted to handle objections but process was inconsistent. Might have acknowledged but jumped to a solution without full clarification, or reframing was weak. Some objections handled, others partially or not effectively. |
|  | **2** | AM became defensive, dismissive, or struggled to respond to objections. Failed to clarify concerns or offer a convincing reframing. Objections were largely unresolved or poorly handled. |
|  | **1** | AM’s response to objections was argumentative, irrelevant, or worsened the client's concern. Completely failed to address the objection or created new ones. |
| 2.5 Creating Genuine Urgency&lt;br>\*(Observable Indicators: Linked action to client's timeline/consequences. Leveraged natural deadlines.)\* | **5** | AM expertly cultivated genuine urgency by deeply connecting the decision to act with the client's critical timelines, quantified costs of inaction, and strategic opportunities, making immediate action feel imperative and logical for the client. |
|  | **4** | AM effectively created urgency by linking the decision to act with client's stated timelines, potential negative consequences of delay, or relevant natural deadlines. |
|  | **3** | AM attempted to create urgency but it felt somewhat forced, generic (e.g., "offer ends soon" without strong context), or not strongly tied to the client's specific situation. |
|  | **2** | No significant attempt to create genuine urgency, or attempts were based on artificial pressure tactics that were ineffective or poorly received. |
|  | **1** | AM’s attempt to create urgency was perceived as overly aggressive, manipulative, or damaged trust. |
| 2.6 Asking for Commitment / Closing&lt;br>\*(Observable Indicators: Recognized buying signals. Asked for commitment. Summarized terms.)\* | **5** | AM adeptly recognized subtle buying signals and seamlessly transitioned to a confident, natural ask for commitment at the opportune moment. Expertly summarized terms and next steps, ensuring enthusiastic client agreement. |
|  | **4** | AM recognized buying signals and clearly, confidently asked for commitment. Accurately summarized agreed-upon terms. |
|  | **3** | AM hesitated or was somewhat unclear when asking for commitment, or missed some buying signals. Summary of terms was adequate but could have been clearer or more comprehensive. May have needed prompting. |
|  | **2** | AM failed to recognize clear buying signals or did not ask for commitment when appropriate. Alternatively, the ask was very weak, premature, or poorly timed. |
|  | **1** | AM’s attempt to close was awkward, pushy, or created a negative reaction, potentially jeopardizing the opportunity. |
| 2.7 Defining Specific Next Steps (Pitch)&lt;br>\*(Observable Indicators: Clearly outlined immediate, actionable next steps for both parties post-agreement or discussion to maintain momentum.)\* | **5** | AM proactively and with exceptional clarity detailed all immediate next steps for both parties, including timelines and responsibilities, confirming mutual understanding and instilling strong confidence in moving forward. |
|  | **4** | AM clearly outlined actionable next steps for both parties, assigned responsibilities, and confirmed understanding to ensure momentum. |
|  | **3** | AM mentioned next steps, but they were somewhat vague, lacked clear ownership for all items, or timelines were not specified. Some ambiguity remained. |
|  | **2** | No clear next steps were defined specifically related to the pitch/consultation, or steps mentioned were confusing and lacked clear actionability. |
|  | **1** | AM created confusion regarding next steps related to the pitch or set incorrect expectations, potentially stalling momentum. |

**Section 3: Servicing Focus**

| **Behavior/Skill** | **Score** | **Detailed Breakdown of Behavior for Score** |
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| 3.1 Enquiry & Issue Comprehension&lt;br>\*(Observable Indicators: Acknowledged timely. Asked clarifying questions. Accurately diagnosed.)\* | **5** | AM responded exceptionally promptly. Asked insightful, targeted clarifying questions that quickly got to the root cause of complex issues, demonstrating deep understanding. Diagnosis was swift and accurate. |
|  | **4** | AM acknowledged enquiry/issue within expected timeframe. Asked relevant clarifying questions to understand the full scope. Accurately diagnosed the issue. |
|  | **3** | AM’s acknowledgement was slightly delayed or clarifying questions were basic, leading to a somewhat superficial understanding or requiring client to repeat information. Diagnosis was generally correct but may have missed some nuances. |
|  | **2** | AM was slow to acknowledge or failed to ask sufficient clarifying questions, leading to a poor understanding of the issue. Diagnosis was incorrect or incomplete. |
|  | **1** | AM failed to acknowledge or showed a complete lack of understanding of the issue due to poor questioning or inattention, frustrating the client. |
| 3.2 Solution / Workaround Quality & Explanation&lt;br>\*(Observable Indicators: Proposed accurate solution/practical workaround. Clearly explained benefits, implications, limitations. Managed expectations.)\* | **5** | AM provided an exceptionally effective and well-explained solution or a highly creative and practical workaround. Masterfully managed expectations regarding any limitations, ensuring full client understanding and satisfaction. |
|  | **4** | AM proposed an accurate solution or a viable, practical workaround. Clearly explained the solution/workaround, including benefits and any key implications/limitations. Managed expectations effectively. |
|  | **3** | AM proposed a solution/workaround that was generally adequate but explanation was somewhat unclear, incomplete, or missed some implications. Expectation management was present but could have been better. |
|  | **2** | AM proposed a solution/workaround that was ineffective, difficult to implement, or poorly explained. Failed to manage expectations regarding limitations, leading to potential future dissatisfaction. |
|  | **1** | AM proposed a harmful solution/workaround, or explanation was misleading/confusing, creating more problems or significantly mismanaging expectations. |
| 3.3 Escalation Management (if occurred)&lt;br>\*(Observable Indicators: Internal: Clear documentation, correct routing. External De-escalation: Calm, empathetic, active listening, validated experience, took ownership.)\* | **5** | Internal: Flawless, comprehensive documentation enabling immediate action by receiving team. External: Masterfully de-escalated a highly emotional client, showing exceptional empathy, validation, and control, turning a negative situation positive. |
|  | **4** | Internal: Clear, complete documentation provided; correctly routed. External: Effectively de-escalated an upset client using active listening, empathy, and reassurance, taking clear ownership. |
|  | **3** | Internal: Documentation was adequate but lacked some detail or clarity. External: Attempted de-escalation, generally remained calm, but empathy/validation could have been stronger or process felt a bit mechanical. Client calmed somewhat. |
|  | **2** | Internal: Documentation was poor, incomplete, or incorrectly routed, causing delays. External: Struggled to de-escalate, may have become slightly defensive or failed to show sufficient empathy. Client remained significantly upset. |
|  | **1** | Internal: No proper documentation or escalation process followed. External: AM’s actions escalated client’s frustration (e.g., became argumentative, dismissive, blamed client). |
| 3.4 Timeline Communication (for issues/requests)&lt;br>\*(Observable Indicators: Provided initial realistic ETA. Proactive updates, especially for delays. Transparency.)\* | **5** | AM was exceptionally proactive in setting realistic ETAs and providing timely, unsolicited updates. Handled news of delays with great transparency and empathy, renegotiating expectations masterfully and maintaining client trust. |
|  | **4** | AM provided initial realistic ETAs and proactively updated client on progress, including reasons for any delays and revised timelines. |
|  | **3** | AM provided ETAs but they were sometimes vague or overly optimistic. Updates on delays were mostly reactive (client had to ask) or lacked full transparency. |
|  | **2** | AM failed to provide clear ETAs or provide updates on progress/delays, leaving the client uncertain. Communication was minimal or only when prompted. |
|  | **1** | AM provided misleading ETAs, failed to communicate significant delays, or showed a lack of concern for client's time, severely damaging trust. |
| 3.5 Feature Request Handling (if occurred)&lt;br>\*(Observable Indicators: Understood underlying need. Expressed gratitude. Managed expectations on roadmap. Offered alternatives.)\* | **5** | AM showed exceptional skill in understanding the deep business need behind the feature request. Masterfully managed expectations regarding product roadmap with full transparency while making the client feel highly valued. Proactively offered insightful alternatives. |
|  | **4** | AM actively listened to understand the need behind the feature request. Expressed gratitude, managed expectations about roadmap realities clearly and honestly. Offered viable alternatives/workarounds where appropriate. |
|  | **3** | AM noted the feature request but didn't deeply explore the underlying need. Expectation management was basic (e.g., "I'll pass it on") or alternatives offered were not well-suited. Client may feel heard but not fully understood or supported. |
|  | **2** | AM was dismissive of the feature request or overpromised on its likelihood/timeline without basis. Little attempt to understand the need or offer alternatives. Client likely felt unheard or misled. |
|  | **1** | AM responded negatively or inappropriately to a feature request, damaging rapport or setting completely false expectations. |
| 3.6 Confirmation of Resolution / Next Steps (Servicing)&lt;br>\*(Observable Indicators: Confirmed issue resolved to client's satisfaction. Clearly outlined remaining steps/monitoring.)\* | **5** | AM proactively confirmed complete client satisfaction with the resolution. With exceptional clarity, detailed any remaining steps or monitoring, ensuring the client felt fully supported and confident in the outcome. |
|  | **4** | AM confirmed with the client that the issue was resolved to their satisfaction. Clearly outlined any necessary remaining steps or monitoring. |
|  | **3** | AM asked if issue was resolved but didn't ensure full satisfaction, or next steps/monitoring were somewhat unclear or incomplete. |
|  | **2** | AM assumed issue was resolved without confirming client satisfaction, or no clear next steps/monitoring were mentioned when needed. |
|  | **1** | AM incorrectly closed an issue that was not resolved, or provided incorrect/confusing information about next steps, leading to further client effort or frustration. |