



Integrated Risk Solutions Demo Scorecard

Partner:	Solution:		
Place a score (1-10) in the appropriate box. 1-5 = Below Standard 6-7 = Needs Improvement 8-9 = Meets Expectations 10 = Exceeds Expectation Add up the total at the bottom to get the final score Divide total number by 11 to get final score. Note: Passing score is 8.0	1st Line Manager Score (1-10)	2nd Line Manager Score (1-10)	Field Readiness Score (1-10)
Articulate Value and Differentiation			
Prepares a smooth demo environment & Eloquently narrates demonstration & presentation			
Demonstrates knowledge of relevant Defensible Differentiators	#DIV/0!	#DIV/0!	#DIV/0!
Landing Page			
Focus Page			
Reports & Dashboards			
Forms (Tests/Procedures)			
PBC (Not applicable to Policy)			
Reports & Dashboards			
Audit Committee Reportings			
Shares customer/ prospect/ industry stories and challenges			
Handles objections and competition effectively			
Conveys solution value			
Selling Skills			
Uses the Mantra to recap conversation			
Engages to solicit client's participation and confirm findings			
Tailors discussion to the value drivers and confirms client's goals			
Meeting Management			
Manages time to allow for a proper intro, closing to the meeting & Respects time offered by the client			
Is prepared and confident			
Total (add up each column to get the "Total" number and divide by 10)	#DIV/0!	#DIV/0!	#DIV/0!
Final Score:	#DIV/0!	#DIV/0!	#DIV/0!
Comments:			