

FIVE STAR SCORECARD

GRADING CRITERIA · OVERVIEW

25 points across five sections. Stars = points earned ÷ points possible × 5.

DONE
The caller did it.

NOT DONE
Missed it. Still counts in the total.

NA
Couldn't apply. Removed from the total.

REQUIRED Every call **NA** When it doesn't apply **DQ** Disqualifies the appointment, reason named

1. SCRIPT ADHERENCE

6 PTS · ONE PER ITEM

INTRODUCTION	Recorded line, what the client does, acknowledge their time, open-ended question. All four or zero.	
DIFFERENTIATOR OR CASE STUDY	Something that sets the client apart, or who they've worked with.	
RECAPPED REASON FOR MEETING	Recap the agenda after the date and time. In person: ask about arrival.	
FEEL FELT FOUND	Used when an objection comes up.	NA · NO OBJECTION
CONSIDERATION QUESTION	Ask if they'd consider the client in the future.	REQUIRED DQ · CONSIDERATION QUESTION NOT ASKED
DECISION MAKING QUESTION	Ask who's involved in decisions. Not leading.	REQUIRED DQ · DECISION MAKING QUESTION NOT ASKED

2. APPOINTMENT COMMITMENT

5 PTS · ONE PER ITEM

SCHEDULING PREFERENCES	Book inside the client's days, times and windows.	DQ · DOES NOT MEET QUALIFICATIONS
WITHIN 5 BUSINESS DAYS	Attempt a date inside the window.	
ASKED TO ACCEPT INVITE	Scored on the ask, not the accept.	NA · PROSPECT RUSHED OFF
CALENDAR INVITE SENT	Invite went out for this opportunity.	NA · NO CALENDAR CONNECT
PREFERRED LOCATION	Client's meeting type, in their order.	DQ · DOES NOT MEET QUALIFICATIONS
MEETING LENGTH · NOT SCORED	Never promise less than the client requires, or under 30 minutes if none is stated.	DQ · MEETING DURATION TOO SHORT

3. QUALIFIERS

4 PTS

LEAD QUALIFIED	Meets qualifiers, trips no disqualifiers.	DQ · NOT QUALIFIED
CONFIRMED CONTACT INFO	Title, email, address (in person), phone (phone meeting). All or nothing.	DQ · ADDRESS NOT CONFIRMED DQ · PHONE NUMBER NOT CONFIRMED
REQUIRED PROBING QUESTIONS	Every question the CID marks Required.	NA · NONE ON CID DQ · FURTHER PROBING NEEDED
PHONE VALIDATED QUALIFIERS	1 by phone · 0.5 online · 0 not qualified.	DQ · DID NOT VERIFY QUALIFIER
CONTACT RECORD · AFTER THE CALL	Contact address matches the appointment note (in person). Note's number is in a Contact phone field (phone).	DQ · CONTACT ADDRESS NOT UPDATED DQ · CONTACT PHONE NOT UPDATED

4. DECISION MAKER

5 PTS · PICK ONE

- 5** **FINAL KDM** · The decision is theirs.
- 2.5** **INFLUENCER** · They influence the decision.
- 0** **NEITHER** · Not asked, deflected, or no role.

5. NEED

5 PTS · PICK ONE

- 5** Timeline within 6 months.
- 2.5** Timeline within 6–12 months.
- 1** Beyond 12 months or unknown.
- 0** Unclear reason to meet. **DQ · AGENDA NOT CONFIRMED**