

WHOLEALER MASTERMINDS RIDE-ALONG EVALUATION

At Wholesaler Masterminds® we know that the best sales managers are the ones that wear multiple hats. They have the ability to train, mentor, motivate and coach their wholesaling team depending on the level of experience and success that the individual wholesaler has had.

This *Wholesaler Masterminds Ride-Along Evaluation* form should be completed during each ride-along visit, and reviewed with the wholesaler, either prior to departure or on a scheduled debrief call.

IMPORTANT: This form can be printed, or is designed to be used with [Adobe Fill & Sign – Easy PDF form filler](#). This free app for iPad and iPhone allows you to complete and process the evaluation almost effortlessly.

Instructions: Rate the wholesaler on a scale of 1 to 6 wherein 6 indicates the highest level of proficiency and 1 indicates the most significant need for improvement.

Where applicable, we have cross referenced a [link](#) to our site that further explains, enhances or provides reference material for a particular competency discussion.

Date: Wholesaler Name:

ADVISOR RECON – demonstrates ability to connect with advisor’s head and their heart [\[link\]](#)

1	2	3	4	5	6
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Notes:

PROBING/ASKS RIGHT QUESTIONS – uses predetermined questions that uncover advisor insights and needs [\[link\]](#)

1	2	3	4	5	6
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Notes:

LISTENING – uses active listening techniques that indicate wholesaler is engaged in the discussion [\[link\]](#)

1	2	3	4	5	6
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Notes:

MEETING ORGANIZATION/DOCUMENTATION – has a process to capture appointment data e.g. *Advisor Data Sheet* and/or successfully uses meeting agenda [\[link\]](#) [\[link\]](#)

1	2	3	4	5	6
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Notes:

PRODUCT PRESENTATION – clearly and effectively explains product features and benefits in a concise manner, tailored to individual advisor's/team's practice

1	2	3	4	5	6
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Notes:

PVP – PEERLESS VALUE PROPOSITION – effectively describes their wholesaling brand, how it benefits the advisor, and separates them from the wholesaling “Sea of Sameness” [\[link\]](#)

1	2	3	4	5	6
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Notes:

TRIAL CLOSING – interjects trial closing questions to further discern advisor's comprehension of products/concepts presented [\[link\]](#)

1	2	3	4	5	6
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Notes:

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CLOSING/MOVING THE SALES PROCESS FORWARD – suggests/implements a next step plan that further engages the advisor e.g. Zephyr, illustration, social event, forward scheduling etc. [\[link\]](#)

1	2	3	4	5	6
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Notes:

FOLLOW-UP PROCESS – articulates a clear and repeatable multi-step *Systematized Follow-up Process* based on advisor segment and/or type of activity e.g. prospects, road show attendees [\[link\]](#)

1	2	3	4	5	6
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Notes:

OTHER TOPICS AND COMPETENCIES TO CHECK IN ON:

COI COVERAGE AND EFFECTIVE LEVERAGING [\[LINK\]](#)

1	2	3	4	5	6
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INTERNAL PARTNER RELATIONSHIP AND EFFECTIVE UTILIZATION [\[LINK\]](#)

1	2	3	4	5	6
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OFFICE DAY PRODUCTIVITY [\[LINK\]](#)

1	2	3	4	5	6
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EFFECTIVE 'PRESENCE IN YOUR ABSENCE' E.G. EMAIL, SNAIL MAIL, VOICE MAIL MARKETING [\[LINK\]](#)

1	2	3	4	5	6
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USES TECHNOLOGY FOR PRODUCTIVITY AND ORGANIZATION [\[LINK\]](#)

1	2	3	4	5	6
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AGREED UPON FOLLOW-UP/ACTION ITEMS: