



**REVINATE**

Reservation Sales Agent  
Self Scoring Template

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## Reservation Sales Agent Self Scoring Template

This questionnaire is a tool for your reservation agents. It allows them to proactively improve their sales skills by scoring their own calls, identifying opportunities and setting goals based upon your recommended call flow. Self-scoring on a regular basis can also be used along with your scoring and coaching to enhance your sales culture.

For maximum benefits, REVINATE Best Practices recommends that your agents:

- Score “Not Booked” and “Hot Lead” calls only.
- Score one “good” call and one “opportunity” call.
- Set their own goals for areas they want to improve.

Agents should note their conversion rate prior to self-critiquing. If they score themselves and make the changes they identified, they will see an increase in their conversion. When this happens, reward them!

**Note: Agent self-scoring is not meant to be a substitute for a manager scoring calls and coaching agents.**

### *Suggestions to Managers:*

#### **1. Provide positive feedback to your agents.**

Self-critique can sometimes take an undesired turn for the worse to the point that your agents no longer hear what they are doing well. Take note of your agents' goals as they communicate them via the completed forms and be sure to note positive efforts and excellence while acknowledging areas for improvement. Ask them if they need additional resources to help them achieve their goals.

#### **2. Use self-scoring goals as a discussion topic during group meetings or coaching sessions.** Have your agents share their goals with the group. This forum will facilitate brainstorming, team building and enhance your sales culture.

#### **3. Require agents to fill out self-critique forms prior to coaching sessions.** This will give managers some insight as to how agents view their own performance so that you can better calibrate where to begin when setting strategic goals.

#### **4. Reward agents that utilize self-critique forms to improve their sales skills and achieve their goals.** Agents who take the additional steps to improve their performance are employees that you will want to acknowledge publicly and privately. This will reinforce their desire to succeed and demonstrate to them that they are valued within your organization.

Name: \_\_\_\_\_ Date/Time of Call: \_\_\_\_\_ Call Result: \_\_\_\_\_

Non-Negotiable and Description	Value	YES	NO	N/A
<p><b>START WITH THE PROPER GREETING</b></p> <ul style="list-style-type: none"> <li>Use the property's full name, state your own name, and ask for the guest's name.</li> </ul>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>ASK OPEN ENDED QUESTIONS</b></p> <ul style="list-style-type: none"> <li>Ask qualifying questions to identify the guest's needs.</li> <li>Use information provided to build rapport and sell the experience.</li> </ul>	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>ENGAGE IN CONVERSATION</b></p> <ul style="list-style-type: none"> <li>Use the guest's name conversationally, but discreetly throughout the call.</li> <li>Use information learned through discovery or from past stays (using CRM) to build rapport.</li> <li>Share a bit of yourself by giving them a local viewpoint.</li> </ul>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>GIVE TAILORED RECOMMENDATIONS WITH CONFIDENCE AND PRIDE</b></p> <ul style="list-style-type: none"> <li>Use information gathered to make recommendations tailored to the guest's specific needs.</li> <li>Exhibit a genuine sense of interest and concern for the caller's satisfaction.</li> <li>Lead the conversation and try to anticipate needs. Drive call with confidence and pride.</li> </ul>	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>MAINTAIN AN UPBEAT FRIENDLY TONE AND CADENCE</b></p> <ul style="list-style-type: none"> <li>Use a pace that is appropriate, clear, confident, and mirrors the caller.</li> <li>Maintain an energetic, enthusiastic, yet gracious tone throughout the call.</li> <li>Be well spoken, avoid slang, phrase fragments, "dead air", and no "ums."</li> </ul>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>ASK FOR THE RESERVATION</b></p> <ul style="list-style-type: none"> <li>Ask for the reservation after effectively selling the tailored experience.</li> <li>While this seems obvious, REVINATE data shows that agents skip this step 60% of the time.</li> <li>Recap the reservation guidelines, deposit, and cancellation policies</li> </ul>	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>ATTEMPT TO OVERCOME OBJECTIONS</b></p> <ul style="list-style-type: none"> <li>Overcome objections by leveraging urgency, requesting flexible dates, and asking additional clarifying questions.</li> <li>In lieu of offering discounts, find alternative options to overcome the guest's objections to making the reservation.</li> </ul>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>OFFER TO FOLLOW-UP WITH OUTBOUND CALL</b></p> <ul style="list-style-type: none"> <li>Attempt to follow-up with a guest if they need to speak to another party prior to proceeding with securing a reservation.</li> <li>Offer to set up a follow-up appointment.</li> </ul>	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<p><b>THANK THE CALLER</b></p> <ul style="list-style-type: none"> <li>• Politely close call with sincere appreciation and rebrands the property.</li> <li>• Offer additional assistance. Give anticipatory remarks.</li> </ul>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>CREATE AN ACCURATE AND HIGH-QUALITY LEAD</b></p> <ul style="list-style-type: none"> <li>• Capture the guest's email address, dates of stay, and reason for stay.</li> <li>• Accurately fill in all the Lead fields (room, price quote, number of guests, and country).</li> <li>• Lead notes deliver accurate information with details, including any special requests.</li> </ul>	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Total: 75  
Points**

*Agent Self-Score Review*

1. Which non-negotiables did you do well and why?
  
2. Which non-negotiables can you improve on? How would you improve?
  
3. I was able to identify the guest's primary needs and make personal recommendations for those needs. Yes/No
  
4. The guest's primary need was:
  
5. My personalized recommendations were:

6. I earned the right to ask for the reservation. Yes/No why?

7. I asked for the reservation. Yes/No

8. List one or two things you will work on to improve the quality of future reservation calls: