# Maya Okafor · Coaching report (fictional sample)

Calls From: Sep 15 – Oct 2, 2026 • Sales Rep: Maya Okafor

**Fictional example.** This is a sample Close-Rate coaching report. The company, people and calls are invented. We also wrote the coaching and chose the rubric level for each skill on each call. The PDF layout, the scoring arithmetic and the quote checks are the product's own. Read it with notes at close-rate.com/sample-report, or run it on your own calls with a Close-Rate trial.

## Executive Summary

You ask good questions about how a buyer's business runs, and you're candid about what Keelstone can't promise. Buyers respond to both. One habit shows up across these calls: when a buyer describes something costly, you explain how Keelstone fixes it before they've said what it costs them, and before you've checked you have their priorities in the right order. This report puts its weight on that habit, with a drill to practice before Thursday's Brackwater call.

ACTION

### Ask what it led to before you pitch

When a buyer describes a costly event, ask what happened next and how much it matters before mentioning Keelstone. Practice with the drill in Discovery. Next-call check: on Thursday, did Walt or Renee describe the impact in their own words before you presented?

From Discovery · Brackwater Freight

**Owner:** rep

ACTION

### Check the order before presenting

Summarize what you heard, then ask whether you have the order right, and lead with whatever they put first. Next-call check: the buyer confirmed or corrected your summary before you showed anything.

From Value Presentation · Brackwater Freight

**Owner:** rep



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ACTION

### End with a deliverable, an owner and a date

Use your Wrenfield recap as the template: what you'll send, what they'll do, and when you'll talk next. Next-call check: Thursday ends with a dated step that says what Walt needs to see.

From Closing · Brackwater Freight

From Closing · Wrenfield Home Health

**Owner:** rep

## Performance Overview

| Calls | Close Rate | Calls From |
|---|---|---|
| 8 | **33.3%** of 6 decided calls. Includes 2 calls marked Not Closed automatically. | **Sep 15 – Oct 2, 2026** |

## RAPPORT BUILDING



**4**/5

Partial coverage

8/8 calls contributed

SUB-COMPETENCY BREAKDOWN

**Rapport** — 4.2/5

8 scored of 8 calls; 0 not applicable; 0 not enough context; 0 couldn't complete assessment.

**Call Framing** — 3.9/5

7 scored of 8 calls; 0 not applicable; 1 not enough context; 0 couldn't complete assessment.

You listen well. You pick up what buyers say and build on it, and they keep talking. The opening is where you can do more: on Brackwater and Kettleby you stated your agenda and asked what the buyer wanted, but didn't check their time or what the call should decide. On Pinehollow you did all three, and both buyers set the agenda with you in the first minute.



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STRONG EXAMPLE

VERIFIED

### Pinehollow: Time, Priorities, Decision

**Maya Okafor (Rep)** The Sep 21 call with Pinehollow Dental Group

*"Before we start, I have us until 2:45. Dr. Marsh, Lisa, what would make this a good use of the next forty minutes for each of you? And at the end, would it be useful to decide whether a second conversation makes sense, or is today just about learning?"*

**Why it worked:** You named the time, asked each buyer what would make the call worthwhile, and asked up front whether today should end in a decision. Both answered before you asked a single discovery question, so the agenda was theirs as much as yours.

**Pattern to repeat:** Time, their priorities, the decision. Ask all three in the first two minutes, and let the buyer change the plan.

FROM THE CALL

VERIFIED

**Maya Okafor (Rep)** The Sep 29 call with Brackwater Freight

*"Thanks for making time, Renee. I'd like to use the first part of this to understand how finance runs at Brackwater today, and then, if it's useful, show you how we've set this up for other carriers. Does that work, or is there something you need to get out of today?"*

**Why it matters:** A good start that stops one question short. Renee's answer, getting this off the ground before year-end, was the most useful thing she said in the first five minutes, and you didn't ask what made year-end matter until 24 minutes in.

SCRIPT PATCH

**Situation:** Opening a first call (Brackwater, Sep 29)

**BEFORE**

*"Thanks for making time, Renee. I'd like to use the first part of this to understand how finance runs at Brackwater today, and then, if it's useful, show you how we've set this up for other carriers. Does that work, or is there something you need to get out of today?"*

**AFTER**

*"Thanks for making time, Renee. I have us until 11:45. Does that still work? I'd like to understand how finance runs at Brackwater today and, if it's useful, show you how we've set this up for other carriers. What do you need to get out of today, and if it goes well, what should we decide at the end?"*

**Why better:** It adds the two checks you skipped: time and the decision. When Renee said 'before year-end,' you'd have had a reason to ask why right then.



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# DISCOVERY



**3.3**/5
Partial coverage
7/8 calls contributed

SUB-COMPETENCY BREAKDOWN

| | | |
|---|---|---|
| **Discovery — Breadth** | **3.7/5** | 7 scored of 8 calls; 0 not applicable; 1 not enough context; 0 couldn't complete assessment. |
| **Discovery — Depth** | **3.4/5** | 7 scored of 8 calls; 0 not applicable; 1 not enough context; 0 couldn't complete assessment. |
| **Pain Amplification** | **2.8/5** | 5 scored of 8 calls; 2 not applicable; 1 not enough context; 0 couldn't complete assessment. |
| **Discovery Close** | **3.2/5** | 5 scored of 8 calls; 2 not applicable; 1 not enough context; 0 couldn't complete assessment. |

Your questions about how a buyer's business runs are thorough. The gap is what happens right after a buyer tells you something expensive: on Brackwater and Wrenfield you went straight to how Keelstone fixes it, before the buyer had said what the problem costs them. On Ellery & Rhodes you stayed with it for two more questions, and Celia told you it was the main thing on her list.

## The Conversation Moment

**Buyer Signal**
Renee Castillo (Customer): Honestly, by the time we close, the month is half over and I'm still guessing on cash. Last winter we had to pull from the line to make payroll, and I didn't see it coming until about four days before.

**Rep Response**
Maya Okafor (Rep): That's exactly what our controllers fix. Most of our clients are closing in ten business days within the first quarter, and you'd get a thirteen-week cash forecast every Monday.

**Buyer Reaction**
Renee Castillo (Customer): Okay. I mean, we've heard that before.

**Coaching Interpretation (AI)**
Renee described a specific, costly event: drawing on the credit line to make payroll with four days of warning. The response moved to Keelstone's results before she had said what that event meant for her or for Brackwater, and her reply suggests the claim didn't land on its own.

**Counterevidence**
Renee Castillo (Customer): I'll be straight with you. We used an outsourced bookkeeping firm in 2024. We had three different people on our account in eight months, and they missed a sales tax filing. Walt still brings it up.



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**Uncertainty**
Her doubt may come from the 2024 bookkeeping firm she mentions later, not from this answer. Text alone can't show how she felt.

From the Sep 29 call with Brackwater Freight. Text and order matched; roles and interpretation are AI-inferred. Buyer agreement is not a measure of rep skill.

**MISSED MOMENT** · pivoted_to_solution VERIFIED

### Brackwater: Four Days' Notice

**Maya Okafor (Rep)** The Sep 29 call with Brackwater Freight

*Context:* Maya Okafor (Rep): What's the hardest part of running finance this way? Renee Castillo (Customer): Honestly, by the time we close, the month is half over and I'm still guessing on cash. Last winter we had to pull from the line to make payroll, and I didn't see it coming until about four days before.

**WHAT WAS SAID**
*"That's exactly what our controllers fix. Most of our clients are closing in ten business days within the first quarter, and you'd get a thirteen-week cash forecast every Monday."*

▼

**WHAT SHOULD HAVE BEEN SAID**
*"Four days' notice on payroll. What did that week look like for you? (Let her answer.) And if you'd seen it coming six weeks out instead of four days, what would you have done differently?"*

**Why it matters:** Renee had just described a specific, expensive surprise. Your answer was accurate, but it was your description of the problem, not hers, and she discounted it straight away. Fourteen minutes later she told you the forecast is what she cares about most. If she had described what that surprise cost her and Walt, you'd have her words to bring into Thursday's call.

**STRONG EXAMPLE** VERIFIED

### Ellery & Rhodes: The Bid That Repeats

**Maya Okafor (Rep)** The Oct 2 call with Ellery & Rhodes Architects

*"Three months after. What happens when you find out that late?"*

**Why it worked:** You repeated her phrase and asked what it leads to, without suggesting an answer. Celia named the real cost herself, the next bid repeating the loss, and then ranked it as her top priority. You never had to argue that the problem mattered.

**Pattern to repeat:** Repeat the buyer's words, ask what they lead to, then ask how much it matters compared to everything else.



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DRILL

## Two questions before the pitch

**Goal:** When a buyer describes a costly problem, get their own account of what it led to, and how much it matters, before you describe Keelstone.

**Steps:**

1. Have your manager or a peer read you these three buyer lines from your own calls, one at a time: Renee's payroll scare (Brackwater), Joanne's Medicaid lag (Wrenfield) and Celia's late project losses (Ellery & Rhodes).
2. Answer each with one open question about what happened next. Don't mention Keelstone, and don't suggest an answer.
3. When they answer, ask how much it matters compared to everything else on their plate.
4. If they say it isn't a big deal, accept it and move on. That's information too.
5. Run it twice. Record the second round and listen for any 'we', 'our' or numbers in your first response.

**Example language:**

*"Four days' notice on payroll. What did that week look like for you?"*

**Self-check:**

- My first response was a question, with nothing about Keelstone in it.
- The buyer described the impact in their words, not mine.
- I asked how much it matters before moving on.

**2 of 5**

scored calls where you described Keelstone's fix before asking what the problem led to

n=5

## VALUE PRESENTATION



**3.6**/5

Evidence-based rubric

7/8 calls contributed

SUB-COMPETENCY BREAKDOWN

| | | |
|---|---|---|
| **Value Tailoring** | 3.3/5 | 7 scored of 8 calls; 1 not applicable; 0 not enough context; 0 couldn't complete assessment. |
| **Product Knowledge** | 4/5 | 7 scored of 8 calls; 1 not applicable; 0 not enough context; 0 couldn't complete assessment. |

Your explanations are clear, and you say plainly what Keelstone can't do. Joanne and Lisa both responded to that. Where it slips is the order: on Brackwater you summarized Renee's needs and started presenting in the same breath, and she had to correct which need mattered most.



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## The Conversation Moment

**Buyer Signal**
Not observed in this passage.

**Rep Response**
Maya Okafor (Rep): Based on what you've told me, here's how I'd see it working. Your controller takes the reconciliations off your nights, Carla keeps chasing receipts but into one shared close checklist, and you get a cash forecast you can actually plan payroll and dispatch around.

**Buyer Reaction**
Renee Castillo (Customer): The forecast is the part I care about. The nights, honestly, I've made peace with.

**Coaching Interpretation (AI)**
The summary was accurate, but it led with the need Renee ranks lowest, and it went straight into presenting without asking whether it was right. Her correction came after the presentation had started instead of shaping it.

**Uncertainty**
Renee may rank these differently with Walt in the room. Her correction shows her priority, not how the rest of the presentation landed.

From the Sep 29 call with Brackwater Freight. Text and order matched; roles and interpretation are AI-inferred. Buyer agreement is not a measure of rep skill.

**SCRIPT PATCH**

**Situation:** Moving from discovery to your recommendation (Brackwater, 28:10)

**BEFORE**
*"Based on what you've told me, here's how I'd see it working. Your controller takes the reconciliations off your nights, Carla keeps chasing receipts but into one shared close checklist, and you get a cash forecast you can actually plan payroll and dispatch around."*

**AFTER**
*"Before I show you anything, let me check I've got the order right. It sounds like the cash forecast matters most, so you can see a payroll squeeze coming, then the bank package, and getting your nights back is a bonus. Is that the right order, or would you put it differently?"*

**Why better:** Renee corrected the order anyway. Asking first moves that correction to before you present, so you lead with the forecast and she hears her own priority back. You did exactly this with Celia on Oct 2.



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STRONG EXAMPLE

VERIFIED

### Wrenfield: What I Can't Promise

**Maya Okafor (Rep)** The Sep 23 call with Wrenfield Home Health

*"I can't promise the bank extends the line. What I can promise is that the reporting package they asked for is ready by the tenth of each month, and you'll see it before they do."*

**Why it worked:** You separated what the bank decides from what Keelstone controls, and made a specific promise about the part you control, tied to what Joanne said she needed. A bounded promise is easier to believe than a big one.

**Pattern to repeat:** Name what you can't control, then promise the part you can, with a date.

FROM THE CALL

VERIFIED

**Maya Okafor (Rep)** The Sep 30 call with Pinehollow Dental Group

*"We'd export. I don't want to tell you we work inside your practice software when we don't."*

**Why it matters:** The same move on an integration question: a plain no, then a sample so Lisa can judge for herself. The first nine minutes of this call weren't recorded, so this report can't say how you set it up.

## Same opportunity, two calls

| What happened | Brackwater Freight, Sep 29 | Ellery & Rhodes, Oct 2 |
|---|---|---|
| What the buyer raised | A payroll squeeze she saw four days out | Project losses found three months late |
| Your next move | Described Keelstone's results | Asked what finding out late leads to |
| Who described the impact | You did | Celia did: the next bid repeats the loss |
| Summary before presenting | Given but not checked; Renee corrected it | Checked; Celia confirmed it |

*Both calls gave you the same opening. The difference was two questions and one check.*



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# OBJECTION HANDLING



**3**/5

Partial coverage

4/8 calls contributed

SUB-COMPETENCY BREAKDOWN

| | | |
|---|---|---|
| **Objection — Standard** | **3/5** | 4 scored of 8 calls; 2 not applicable; 2 not enough context; 0 couldn't complete assessment. |
| **Objection — Complex** | **—/5** | 0 scored of 8 calls; 6 not applicable; 2 not enough context; 0 couldn't complete assessment. |

When you ask what's behind a concern before answering it, it works. Joanne's worry about paying two firms turned out to be about cost, not Kevin, and she agreed to a 20-minute call to settle it. When you answer first, as with Malik's price comparison, the call ends on your argument instead of his reason.



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## OBJECTION PATTERNS

### Need to Think / Consult Others (3× · mixed)



The Sep 29 call with Brackwater Freight

### Timing / Not Ready (2× · adequate)



The Oct 2 call with Ellery & Rhodes Architects *"Is that about the team's time during year-end, or about budget for the new year?"*

### Pricing / Budget Concerns (1× · weak)



The Sep 17 call with Kettleby Outdoor Co.

### Can Do It Myself (1× · weak)



The Sep 17 call with Kettleby Outdoor Co.

### Competition / Alternatives (1× · strong)



The Sep 23 call with Wrenfield Home Health *"Then here's how it usually splits. Kevin keeps taxes and the year-end review. We do the monthly close and the…"*

### Trust / Credibility Concerns (1× · adequate)



The Sep 29 call with Brackwater Freight *"That's fair. Your controller would be named in the agreement, and if we ever change who's on your account, you'd hear…"*

## STRONG EXAMPLE

VERIFIED

### Wrenfield: Cost or Kevin?

**Maya Okafor (Rep)** The Sep 23 call with Wrenfield Home Health

*"That makes sense. Is it the cost of overlap that worries you, or is it more about Kevin and his team having to work with someone new?"*

**Why it worked:** You offered two specific readings of her concern and let her pick. Her answer told you exactly what to address, and your offer let Kevin confirm it instead of asking Joanne to take your word for it.

**Pattern to repeat:** Acknowledge it, offer two possible reasons, ask which it is, and answer only the one they choose.



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**MISSED MOMENT** · answered_before_clarifying

VERIFIED

## Kettleby: The Controller Math

**Maya Okafor (Rep)** The Sep 17 call with Kettleby Outdoor Co.

*Context:* Malik Adeyemi (Customer): Seven and a half a month is a lot. For ninety thousand a year I could hire my own controller.

**WHAT WAS SAID**

*"I hear you. But a good controller is going to run you at least one-ten loaded, and you'd still need FP&A on top of that, so we're actually the cheaper option."*

▼

**WHAT SHOULD HAVE BEEN SAID**

*"That's a fair comparison. When you think about hiring instead, is it mainly the monthly number, or is it that you'd rather have someone in the building full time?"*

**Why it matters:** Earlier in the call Malik said he wanted someone who sits with his ops team, and that half his problems are inventory. Your cost comparison answered the question he asked, not the reason behind it. Hiring may well have been right for Kettleby. Losing the deal isn't the issue; not knowing why is.

### The Conversation Moment

**Buyer Signal**

Renee Castillo (Customer): I'll be straight with you. We used an outsourced bookkeeping firm in 2024. We had three different people on our account in eight months, and they missed a sales tax filing. Walt still brings it up.

**Rep Response**

Maya Okafor (Rep): That's a real concern, and I'd want to know it too. What would you need to see from us to know it won't be a repeat?

**Buyer Reaction**

Renee Castillo (Customer): One person who actually knows our business. And I don't want to find out about problems from the state.

**Coaching Interpretation (AI)**

You acknowledged the concern and asked what evidence would matter to her before answering, then made a commitment you control instead of promising what you can't. You didn't check whether that settled it, or whether anything else about 2024 would worry Walt.

**Uncertainty**

Renee's reply is encouraging, but agreement isn't the measure here, and Walt hasn't heard this answer yet.

From the Sep 29 call with Brackwater Freight. Text and order matched; roles and interpretation are AI-inferred. Buyer agreement is not a measure of rep skill.



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ACTION

### Add one check after every objection answer

After you respond, ask: 'Does that cover it, or is there something else behind it?' You answered Celia's timing concern well but didn't check it, and Walt's view of the 2024 firm is still open.

**When:** Starting with Thursday's Brackwater call • **Owner:** rep

## CLOSING



**3.5**/5
Partial coverage
7/8 calls contributed

SUB-COMPETENCY BREAKDOWN

| | | |
|---|---|---|
| **Closing Execution** | 3.9/5 | 7 scored of 8 calls; 0 not applicable; 1 not enough context; 0 couldn't complete assessment. |
| **Urgency Creation** | 3.3/5 | 7 scored of 8 calls; 0 not applicable; 1 not enough context; 0 couldn't complete assessment. |
| **Follow-Up Discipline** | 3.3/5 | 7 scored of 8 calls; 0 not applicable; 1 not enough context; 0 couldn't complete assessment. |

You handle a 'no' with real care. With Quillon you accepted the timing, agreed one short email in March, and said that would be the last unless Hannah wanted more. The gap is the opposite case: when a buyer is interested, your next steps get vague. 'I'll send a few things over' ended the Brackwater call without saying what, by when, or what Walt needs to see.

STRONG EXAMPLE

VERIFIED

### Quillon: A Clean No

**Maya Okafor (Rep)** The Sep 24 call with Quillon Software

*"I appreciate you saying that plainly. It sounds like the right call for where you are. Would it be useful if I checked in after your raise closes, or would you rather reach out if things change?"*

**Why it worked:** You agreed with her reasoning instead of arguing with it, and let her choose whether and when to hear from you. She picked March herself, so the follow-up is one she asked for.

**Pattern to repeat:** When the answer is no, agree with the reason, offer one specific check-in, and let them choose.



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**MISSED MOMENT** · vague_next_step

VERIFIED

### Brackwater: A Few Things Over

**Maya Okafor (Rep)** The Sep 29 call with Brackwater Freight

*Context:* Maya Okafor (Rep): Any questions before we wrap? Renee Castillo (Customer): Not right now. I'll probably think of five tonight.

**WHAT WAS SAID**

*"This was really helpful. I'll send a few things over, and maybe we get Walt on a call next week?"*

▼

**WHAT SHOULD HAVE BEEN SAID**

*"Let's put Thursday the 8th at 9:00 on the calendar with you and Walt. Before then I'll send a one-page plan for having November closed before your December review. What would Walt need to see on Thursday to know whether this is worth his time?"*

**Why it matters:** Renee answered with Thursday mornings for Walt, and earlier she gave you the deadline. A next step with a named deliverable, a date and Walt's criteria gives you something to prepare and gives her something to take to Walt. 'A few things' gives neither.

**FROM THE CALL**

VERIFIED

**Maya Okafor (Rep)** The Sep 23 call with Wrenfield Home Health

*"So, to recap who does what: I'll send the engagement letter and the overlap note for Kevin by Friday, you'll set up the twenty minutes with Kevin, and we'll talk again on Tuesday the 29th."*

**Why it matters:** Every commitment has an owner and a date, including Joanne's. This is the close to bring to Brackwater.

**PARAPHRASE**

Lisa said the partners will decide in January and need materials they can read on their own.

If January is the real decision point, build the Pinehollow follow-up around that meeting rather than a generic check-in.

*AI summary — not a direct quote.*

## 2 of 7

calls that ended with a deliverable, an owner and a date

n=7



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