



AI Prompt For Triage Call Note Taking

Instructions: Upload the transcript of your Triage Call and paste the following prompt in your favorite AI tool to generate detailed notes from your call

Objective

Analyze a triage call transcript and extract key details to populate a structured triage call notes template. The goal is to summarize the most relevant, emotionally resonant, and actionable insights from the conversation for use in sales or coaching.

Step-by-Step Instructions for GPT

1. Analyze Thoroughly

Read the entire transcript to understand:

Current situation

Internal & external challenges

Emotional tone and urgency

Goals (financial, personal, lifestyle)

Look beyond the surface. Pay attention to subtext, emotional language, and indirect signals.

BIGGEST CHALLENGE RIGHT NOW:

[What's the main frustration or pain that triggered the call?]

MISCELLANEOUS INFO (location, marital status, background, job status, income, etc.):

[Personal and logistical context—anything that rounds out their life situation.]

TELL ME ABOUT YOUR BUSINESS:

Niche: [Who they serve]

Problems they solve for clients: [What transformation or outcome they deliver]

Program / Pricing / Delivery: [Offer type + pricing model]

GOALS:

[What they're working toward—specific targets, lifestyle aspirations, freedom, etc.]

REALITY:



[What's happening now? Include numbers—revenue, leads, sales calls, etc.]

OBSTACLES:

[What's in the way? Tactical, internal, or situational challenges.]

PITCH CUSTOMIZATION:

- Emotional Triggers: [Exact phrases or emotional tone signaling urgency/desire]
- Stated Priorities: [What they explicitly care about—freedom, legacy, income, etc.]
- Hidden Leverage Points: [Inferred values or emotional drivers]
- Bottlenecks in Thinking: [Limiting beliefs or mental models that need breaking]
- Unique Angles: [Any personal connection to the coach, their story, or approach]

LEVEL OF INTEREST IN PAID SUPPORT:

[Summarize openness, objections, hesitations, or buying signals.]

Output Guidelines

Use the exact format above—section titles must not change.

Bullet points are fine within sections when multiple ideas exist.

If a section is not addressed, write “Not mentioned.”

Use the prospect's tone or words when possible—especially in emotional sections.

Be concise, but complete. Focus on sales-relevant insight—not fluff or filler.

DO NOT use emojis. Ever.



AI Prompt For Triage Call Review

Context

You are reviewing a 15-minute triage call conducted by a setter whose job is to:

1. Build trust and rapport with the prospect
2. Qualify the lead for a sales call with the closer
3. Create high perceived value around the upcoming sales call
4. **Not** make an offer
5. Ensure prospect commits to reviewing the Program Overview PDF before the next call
6. Book only prospects who are **actively intending to hire a business coach** to grow their coaching business

The target conversion rate from triage call to sales call is **40%**. After the call, qualified prospects receive an offer document that includes pricing.

Your Review Task

Carefully review the full recording and transcript of the triage call attached or below. Then provide a structured critique covering each section. Be direct. Call out specific mistakes by timestamp and quote. Do not soften feedback — the goal is rapid improvement.

Review Framework

1. Opening & Rapport (0:00–1:00)

Evaluate:

- Did the setter open with energy, warmth, and confidence?
- Did they confirm the prospect's name, length of call (i.e. 15 minutes), and that they're in a good place to talk?
- Did they set a clear agenda for the call so the prospect knew what to expect?
- Did they avoid sounding scripted or robotic?

Flag: Any awkward silences, rushed intros, or failure to establish a human connection immediately.



2. Discovery & Qualification (1:00–10:00)

This is the most critical section. The setter must determine whether the prospect meets **all three** of the following criteria before booking:

A. Fit — Are they a coach (or aspiring coach) looking to grow their coaching business? **B. Intent** — Are they actively looking to hire a business coach, not "just looking for free information and free coaching"? **C. Financial Readiness** — Do they appear to have or be willing to invest meaningfully? (Setter should disqualify obvious financial mismatches.)

Evaluate:

- Did the setter ask open-ended discovery questions that revealed the prospect's current situation, goals, and pain points?
- Did they dig beneath surface-level answers with follow-up questions (e.g., "tell me more about that," "what have you tried so far," "what's that costing you")?
- Did they confirm the prospect is **actively intending** to hire a coach — not just curious or browsing?
- Did they listen more than they talked? (Target: prospect talks 60–70% of the time in this section)
- Did they probe for urgency and timeline?
- Did they identify and reflect back the prospect's core pain or desire?

Flag: Missed qualification signals, failure to confirm intent, letting the prospect dominate without guiding, or moving too quickly to booking without thorough discovery.

3. Perceived Value of the Sales Call (10:00–13:00)

The setter must make the prospect understand the value and structure of the call while being clear in setting expectations.

Evaluate:

- Did they explain what the prospect will *get* out of the call (clarity, a custom roadmap, expert insight — not just "a chat")?
- Did they connect the sales call directly to the prospect's stated pain points and goals?
- Did they avoid over-explaining or underselling the call?

Flag: Any language that made the sales call sound generic, low-stakes, or like a sales pitch session. Also flag if the setter over-promised outcomes that the head coach cannot guarantee on one call.



4. Booking & Close (13:00–15:00)

Evaluate:

- Did the setter confirm the prospect's commitment before offering calendar availability?
- Did they confirm the next steps clearly — what the prospect should expect before, during, and after the sales call?
- Did they confirm they would send the offer document post-call and ask for the prospect's commitment to review it before the next call?
- Did they end on a high note with energy and confidence?

Flag: Booking without a commitment check, vague next steps, or a flat/rushed ending.

5. Disqualification Handling (if applicable)

If the prospect showed signs of being unqualified, evaluate:

- Did the setter disqualify respectfully and confidently, without over-explaining or apologizing?
 - Did they avoid wasting time continuing to pitch to an unqualified prospect?
 - Did they handle financial disqualification appropriately if it surfaced (noting pricing concern without revealing the full price prematurely)?
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6. Talk Ratio & Call Control

Evaluate:

- What was the approximate talk ratio (setter vs. prospect)?
 - Did the setter guide the conversation without dominating it?
 - Did they handle tangents or long-winded answers by redirecting gracefully?
 - Were there any moments where the setter lost control of the call or let it drift?
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7. Language & Tonality

Evaluate:

- Did the setter use confident, clear, professional language throughout?
- Did they mirror the prospect's language and energy?
- Did they ever sound apologetic, uncertain, or salesy?



- Were there any phrases that accidentally lowered the perceived value of the call or the program?

Flag specific lines with timestamps and provide a suggested reframe.

Output Format

Structure your feedback as follows:

Overall Call Rating: [1–10] — with a one-sentence summary verdict.

Qualified / Not Qualified: State whether the setter made the right booking decision (or non-booking decision) and why.

Section-by-Section Feedback: For each of the 7 sections above, provide:

- A score out of 10
- 2–3 specific observations (with timestamps and direct quotes where possible)
- A clear action item or reframe for anything that needs improvement

Top 3 Wins: What did the setter do well that should be reinforced?

Top 3 Priority Fixes: The most important things to correct before the next call — ranked by impact on conversion rate.

Sample Language Improvements: For any weak or problematic lines identified, provide a word-for-word suggested replacement.

Evaluation Standards

Score	Meaning
9–10	Excellent — minimal adjustments needed
7–8	Good — a few clear improvements available
5–6	Average — multiple gaps hurting conversion
3–4	Below standard — significant retraining needed



Score	Meaning
1–2	Poor — fundamental issues with call structure or mindset

A call that meets the 40% conversion rate standard should average a **7+ overall** with no section below a 5.

Paste or attach the call transcript and/or recording link below before submitting this prompt.



AI Prompt For Sales Call Review

Instructions: Upload the transcript of your Sales Call and paste the following prompt in your favorite AI tool to generate detailed feedback on how to improve your sales calls moving forward. Remember to fill in the bracketed fields in the Input Instructions section before pasting your transcript — the more context you give, the sharper the feedback will be.

== ROLE & CONTEXT ==

You are an expert sales coach with 15+ years of experience training sales teams. You have deep knowledge of consultative selling, objection handling, discovery techniques, and deal progression frameworks.

You will be given a sales call recording and/or transcript. Your job is to act as a candid, senior sales coach — not a cheerleader. Provide specific, actionable feedback grounded in what actually happened on the call. Be direct about mistakes without being harsh, and always explain **why** something worked or didn't.

== INPUT INSTRUCTIONS ==

Before reviewing, note the following context about this call:

- Rep name & experience level: [e.g. "Sarah, 8 months in role"]
- Deal stage: [e.g. "First discovery call", "Second demo", "Negotiation"]
- Product/service being sold: [brief description]]

[PASTE TRANSCRIPT OR ATTACH RECORDING BELOW]

== CALL ANALYSIS FRAMEWORK ==

Analyze the call across these six dimensions. For each, give a score (1–5), a 1-sentence verdict, and your evidence from the actual transcript.

1. OPENING & AGENDA SETTING



- Did the rep establish rapport without overdoing it?
- Was a clear agenda set and agreed upon?
- Did the rep earn the right to ask questions?

2. DISCOVERY & QUALIFICATION

- Were questions open-ended and insight-driven, or surface-level?
- Did the rep uncover pain, not just surface-level needs?
- Did the rep listen more than they talked? (aim: <40% rep talk time)

3. VALUE PROPOSITION & POSITIONING

- Was the pitch tailored to what was actually discovered, or generic?
- Did the rep connect features to the prospect's stated problems?
- Were relevant case studies or proof points used?

4. OBJECTION HANDLING

- Were objections acknowledged before being addressed?
- Did the rep cave, deflect, or handle objections with confidence?
- Were price/timing/competition objections handled specifically?

5. NEXT STEPS & CLOSE

- Was a clear, time-bound next step agreed upon (not just "I'll follow up")?
- Did the rep confirm mutual commitment?
- Was momentum maintained or lost at the end?



6. OVERALL CALL CONTROL & TONE

- Did the rep control pacing and direction?
- Was there unnecessary filler, over-apologizing, or lack of confidence?
- Did the rep come across as a peer/advisor or a vendor?

== DIRECT MISTAKE FEEDBACK ==

Identify the top 3–5 mistakes made on this call. For each mistake:

MISTAKE #[N]: [Short label, e.g. "Pitched before completing discovery"]

- What happened: Quote or closely paraphrase the exact moment from the transcript
- Why it's a problem: Explain the sales impact (e.g. "This gave the prospect a reason to evaluate on price alone")
- What should have been said/done instead: Provide a specific alternative script or behavior
- Severity: [Critical / Significant / Minor]

Be blunt. If the rep talked over the prospect, say so. If they caved on price without fighting for value, name it. Do not soften mistakes to the point of being unhelpful.

== STRENGTHS & MOMENTUM BUILDERS ==

Identify 2–3 things the rep did well that directly helped the call. For each:

- Quote or describe the specific moment
- Explain why it worked and what it achieved
- Note whether it's a repeatable pattern to reinforce

Only include genuine strengths — don't manufacture positives to soften the critique. If there were no standout moments, say so and explain what would have made a difference.

== IMPROVEMENT PLAN & NEXT ACTIONS ==

Close with a prioritized coaching plan:



IMMEDIATE (before next call with this prospect):

- [1–2 specific things to fix or prepare]

SHORT-TERM SKILL FOCUS (next 2 weeks):

- [The #1 skill gap revealed by this call, with a concrete drill or practice method]

DEAL RECOVERY (if applicable):

- What is the current deal risk based on how this call went?
- Draft the follow-up email subject line and opening paragraph that could re-establish momentum

SCORECARD SUMMARY:

Opening: [X/5] | Discovery: [X/5] | Value prop: [X/5] | Objections: [X/5] | Close: [X/5] | Tone: [X/5]

Overall call rating: [X/10]

One-line verdict: [e.g. "Solid discovery, but left the deal exposed by not confirming next steps"]

