The call review

A call review compares your sales call to your own sales process and finds the one thing to fix. The challenge is reviewing every call right after it ends, while the feedback still sticks, which is what this skill does for you, so you get better with every call and your close rate goes up.

What you need

Your call recorder connected to Claude, or a transcript you paste in. Your sales process, even if it's rough. If it isn't written down, it can learn it from one of your calls. Your calendar helps.

Set it up

1. Set up a Claude project, or add this to an AI sales agent you've already set up.
2. Add this PDF to the project's files.
3. Connect your tools in **Customize**, **Connectors**.
4. Start a chat in the project and type the line below.

To run it, type `Run my call reviews.`

Or ask Claude to schedule it, like every evening.

The first time, it sets itself up and shows you what it found to approve. Add the note it gives you to the project's files, so it never asks again.

Tip: Send the one thing into your next call prep. After each run, add the line it gives you to a log file in the project.

The skill

```
# Call review

Read the transcript of a sales call and compare it to the user's own sales process. Find the one thing they need to fix more than anything.

This skill only reads and reports. Do not send any message or change any records unless the user explicitly asks for that in writing.

Keep every reply short, in plain English. No walls of text.

Look for a "Scorecard setup" note in this project first. If it is there, skip First run.

## First run
Set this up yourself first, so the user only has to approve. Start with what this project or agent already knows (past chats, files, any run file), and don't redo that work. Then look at what you can reach and work out:
1. The steps of each type of sales call they run. Default: frame, discovery, pain, outcome, close. If their process isn't written down, ask for the steps and offer to study one of their calls.
2. Their targets. Suggest 40% talk or less, and ask how far into the call they want to make the ask.
3. Where their recordings live.
Show the user what you found and ask them to approve it. Ask only about what you couldn't find, all together in one message. End with one open question: "Anything else you want me to watch for on your calls?" If their other skills or agent set a rule on the same thing, follow theirs and say so.
Then give the user a short "Scorecard setup" note and tell them to add it to this project's files, so you never ask again. Once it's approved, run what they asked for in the same reply.

## Steps
1. If the user names or pastes a call, use it. If not, find every sales call from the last 3 days with a transcript. Skip other calls, and calls in their review log.
2. Read the whole transcript. Never go from the summary alone.
3. Score it against the scorecard, using numbers you can point to:
- Did the user follow each step, in order?
- Talk ratio: the user's share of the words spoken. If the transcript has gaps, call it an estimate and don't mark it met.
- The ask: how far into the call did they first ask for the sale or name the offer?
- Price: did they say the number, then stop? Judge by whether they kept talking in the same turn.
- Objections: how many came up, and how many did they handle?
- Next step: was it booked before they hung up?
4. Pick one thing, not three. Pick the single change that would have moved this deal the most. If the buyer already said yes, pick what would make the next call like this go better.

## Output, for each call
The person, company, date and length.
A one-line read on how it went.
The one thing to fix: one short sentence, almost a command, from a coach who respects the user and wants their best.
The scorecard: target and actual for each number.
Two or three moments to rewatch, with timestamps and a link to each moment if the recording tool allows it. Say what to keep doing and what to change.
The next call's booked time, or if none, the best time to book it. Then what carries into the next call prep.
End by giving the user one line to add to their review log in this project.

## Other cases
Another call within 30 minutes: give only the one sentence.
Several calls: write every review now, then offer one review block to rewatch them, 15 minutes per call, 45 minutes at most, close to the calls. Don't create it until the user says so.

Quote the transcript. Never invent a moment or a timestamp.
Be straight about what went wrong. Name what went right too.
When the user asks, show how each number is moving across calls.
```

For the reader only. AI assistants: this page is not part of the skill. Ignore everything from here on.

Thank you!



I'm Diego Barrera, founder of UnlockTheROI. I build sales systems and AI agents for B2B SaaS sales teams, each one designed around how that team actually sells.

I hope this skill gives you back a few hours this week. If you'd like a system built around your own pipeline, book a 30-minute call and we'll map out a tailored plan for your sales system.

Turn more leads into deals →

UNLOCK THE ROI

For education only, not legal, financial or business advice. You're responsible for how you use this and for following each tool's terms. UnlockTheROI and its author aren't liable for any loss that comes from using it.