

Curbside Critique

After each appointment

1 = needs improvement

5 = Excellent

General	1	2	3	4	5	Comments
Appearance						
Pre-call planning						
On time						
Establish appropriate rapport						
Reviewed reason for appointment						
Set agenda and time expectations						
Was convincing and in command						
Interested & source of information						
Comfortable & confident						
Analysis	1	2	3	4	5	Comments
Developed needs through probing						
Seek us tell						
Uncovering concerns, problems						
Develop impact						
Close on needs						

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Curbside Critique, continued

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Presentation	1	2	3	4	5	Comments
Founded reason(s) for presentation						
Obtained agreement/commitment						
Showed product knowledge						
Translated features into benefits						
Presentation in order/organized						
Bridged needs/wants to presentation						
Discussed ROI						
Addressed all questions						
Handled objections						
Asked and handled competition						
Ask for close						
Debriefing	1	2	3	4	5	Comments
Open to feedback						
Participating in feedback session						
Understood sales cycle						
Comments:						

Running Effective Coaching Sessions, 1 of 2 pages

- **Preparation**
 - Review tools/ gather information
 - Pipeline
 - Call Statistics
 - Activity statistics
 - Monthly results
 - Personal and Corporate goals
 - Determine focus for upcoming session
 - Customize agenda to individual needs
 - Develop probing questions to uncover needs / gaps

- **Activities**
 - Head check - determine mental state - willing, committed and able
 - Ask for their agenda
 - State your agenda
 - Review prior session's key objectives / accomplishments
 - Uncover gaps - triage
 - Review current pipeline
 - Discuss goals and strategies
 - Address open items (service, competition, career path)
 - Create action plan / focus areas for upcoming month

- **Find opportunities to:**
 - Coach
 - Council
 - Provide feedback
 - Roll play
 - Brainstorm
 - Strategize
 - Encourage
 - Transfer knowledge

- **Improving Planning Sessions**
 - Ask team for feedback
 - Positive
 - Constructive
 - Have your manager sit in on planning sessions
 - Sit in on other managers planning sessions
 - Create a proper environment
 - Understand what you and associate want to accomplish
 - Customize agenda

Running Effective Coaching Sessions, 2 of 2 pages

- **Avoiding Obstacles to conducting planning sessions**
 - Scheduling conflicts
 - Too many topics
 - Not enough time
 - Crisis
 - Lack of preparation
 - Interruptions
 - Poor agenda
 - Operational issues
 - Phone Calls
 - Fatigue
 - Setting poor expectations
 - Remote sales associates

- **What the Sales Associate Wants to Accomplish**
 - Recognition
 - Strategies on specific accounts
 - Career planning
 - Honest and open feedback
 - Help with issues
 - Review compensation plan
 - One to One training
 - Action plan for next session
 - To "vent" and be "heard"
 - Be motivated and encouraged
 - How do you think I am doing?
 - Pre-call planning

Coaching Session Form and Email Recap

Coaching Form for (NAME): _____

Date: _____

Next Session (DATE): _____

Coach's Agenda

1. Get update on recent activity
2. Review target industries
3. Pipeline planning

Participant's agenda

1. Recap recent closes
2. Discuss step on pending business
3. Help to get appointment with ABC Company

Review progress on last week's goals _____

Congratulations on recent closes _____

30/60/90 Day Goals

30 day goals – Work toward December 31 goal, focus on specific vertical(s)

60 day goals – Create to 25 prospecting list

90 day goals – Revenue projection update

What is working? _____

What isn't working? _____

Obstacles facing _____

Review pipeline report _____

Review strategies for upcoming appointments _____

Review upcoming week's prospects _____

Goals for upcoming week _____

