Sales Call Self-Coaching Checklist

(Instructions for completing this form are on page 5)

Date ____________________________ Prospect ____

□ Phone call □ In-person call

Section 1: Pre-Call Preparation

Pre-call preparation is the key to making a successful call.

1. What was my sales call goal or objective for this call? *Having a specific purpose for the call forces you to focus on results and avoid excessive socializing.*
2. How could the goal be more realistic? How could I have changed it? *Were you expecting too much? What was a more realistic goal?*
3. What additional pre-call information would have been helpful? *Were you not prepared for this call as you could have been?*
4. What additional material or information should I have had with me? *What should you be adding to your sales kit when making future calls?*
5. What additional pre-call research could I have done? *What additional sources of information could you have used or should be using?*

Section 2: Approach

Your approach and ability to get the prospect's favourable attention is critical to getting the sale started.

1. If a warm call, did I spend too much time socializing? *Remember, if you're in the Approach step for more than two minutes, you're socializing, not selling!*
2. If a cold call, did I have a strong enough interest statement for this prospect? *Did your opening statement have a benefit that was of interest to the prospect?*
3. What better or more appropriate interest statement could I have used? *What would have been an even stronger opening benefit?*

Section 3: Probe

An effective Probe or qualifying stage is the first step to understanding your prospect's wants and needs.

1.	Did I get the prospect talking through the use of open-ended questions? *Were you getting short or long answers to your questions?*
2.	Did I fully explore the prospect's wants and needs? *Did you stay in the Probe step long enough or did you move to the Prove step too early?*
3.	Do I know who I'm competing against? *Did you remember to ask the C question from the COWMAN*?*
4.	Did or could I have used one of my Differential Competitive Advantages (DCA)? *Have you got at least one, if not two or three, DCAs ready to use?*
5.	Do I know when the purchase decision will be made? *Did you remember to ask the W question from the COWMAN*?*
6.	Do I know how much they have to spend? *Did you remember to ask the M question from the COWMAN*?*
7.	Do I know who will make the final decision or who can veto the sale? *Did you remember to ask the A question from the COWMAN*?*
8.	Did I find out anything of a personal nature about the prospect? *Did you remember to ask the O question from the COWMAN*?*
9.	What rapport-building techniques did I employ? *Were you sensitive to body language matches and mismatches?*

*The COWMAN is an acronym used to remind you of the questions you need to ask when properly qualifying a prospect.

C: **Competition** – Who else is being considered?
O: **Organization** and **Other** person. – Rapport-building questions.
W: **When** – When does the prospect intend to buy; is there a sense of urgency?
M: **Money** – Can the prospect afford your solution; what is their budget?
A: **Authority** – Who has the authority to make the final decision?
N: **Need** – What is the need or want for what you're selling?

Section 4: Prove

We have to Prove to the prospect that they are justified in buying by providing enough facts and benefits.

1. Could I have asked even more questions (Probe) before moving to the Prove step? *Did you check off all the questions from the COWMAN?*
2. What were the main benefits the prospect saw in my product/service? *Did you use check questions to confirm the prospect's interest?*
3. Did all my facts and features have 'benefit' statements with them? *Did you fall into the old trap of just presenting facts and features?*
4. Did my benefits address one or more of the prospect's dominant buying motives? *Did you uncover the prospect's key or dominant buying motives during the Probe step?*
5. What disadvantages might the prospect see? *Where do you have to strengthen your sales presentation?*
6. What evidence or proof could I have used? *Did you use any testimonials, examples, demonstrations, analogies, etc.?*
7. Who else should have been at this meeting? *Is there someone else from either your organization or the prospect's that should have been there?*
8. Did I or could I have offered the prospect a choice of solutions? *Could you have used the 'good/better/best' technique?*

Section 5: Objections

Objections are usually an expression of strong interest on the part of the prospect and are a major step towards closing the sale.

1. What objections did the prospect have? *Did something come up that you weren't expecting?*
2. How could I have handled the objections better or differently? *What objection techniques do you need to brush up on?*
3. What price objection handling techniques did I use? *What price objection techniques do you need to brush up on?*

Section 6: Buying Signals

Most prospects will tell you when they're ready to move forward with the sale.

1. What did the prospect say or do that indicated they wanted to move forward? *Were you sensitive to the prospect's buying signals (or lack thereof)?*

Section 7: Close

Failing to ask for the business at the appropriate time is failing to do your job effectively.

1. What Trial Close did I use? *Remember that a Trial Close can test the waters and pave the way to a successful Close.*
2. Did I ask for the business? What closing technique did I use? *Remember, you lose 100% of the business you don't ask for?*
3. What other ways could I have asked for the order? *Are you prepared to use at least one different closing technique?*
4. Could I have closed sooner? *Did fear of getting a NO stop you from closing sooner?*

Section 8: Follow-up Call

The best time to plan a follow-up call is immediately after you've just made a call.

1. What new information should I bring to the next meeting? *Make note now of what you want to bring to the next meeting.*
2. Who else should be present at the next meeting? *Should someone from either your organization or the prospect's be at the next meeting?*
3. What special circumstances should I be taking into consideration? *Is there something special you can do for the next call?*
4. When should I make the next call? *Don't procrastinate; set the date and time for the meeting now.*

How to Use the Sales Call Self-Coaching Checklist

Why a Checklist?
In the ideal sales world, we would all have a coach (usually called the sales manager) who has the time to go out on sales calls with us to observe, comment and coach us on our performance. He or she would also show us the areas *where* we can improve and make suggestions as to *how* we can improve.

Because many sales managers are up to their necks with management challenges, most don't or can't find the time to perform these coaching duties. This means we have to become our own coaches. In order to successfully self-coach, you need to have a set of guidelines as to what to watch for.

This checklist provides you with those guidelines.

What to Watch For
The checklist consists of a series of self-searching questions for you to honestly answer to yourself. The key is to see what you could have done even better on a particular sales call. By continually uncovering those areas where you can build up your abilities, you will be strengthening your professional selling skills.

How to Use
1. The best time to complete the checklist is as soon as possible after the call is done while the details are fresh in your mind. Don't wait until the end of the day to critique your day's calls. By that time you will have forgotten key elements of the call.
2. Familiarize yourself with the checklist questions by reading them over two or three times before using the checklist. This will help you remember what to watch for during the sales call.
3. Don't plan on using the checklist forever. Commit to using it for a set period of time such as for a week, a few days a week for a month, once a quarter, etc.
4. Don't let the number of questions put you off. You are not expected to answer every question after every sale. Just answer the appropriate ones.
5. If you're having a problem in a particular area of the sales process (Approach, Probe, Prove, Close, etc.) focus your self-coaching energies on that specific area for a period of time and answer all the questions in that section.
6. Don't give yourself a hard time if a sales call goes bad. Use this checklist to review the call and learn from it.
7. Use this checklist on a consistent basis to sharpen your selling skills.

Alternate Use for the Checklist
Use it as a pre-call checklist before making a sales call.