

Sales Manager's Coaching Checklist



Date:	Sales Manager:
Salesperson:	Customer:

General Coaching Checklist

1. Personal Qualities

	Poor	Fair	Good	Exc	Comments
<input type="checkbox"/> Appearance: dress, posture	1	2	3	4	
<input type="checkbox"/> Attitude	1	2	3	4	
<input type="checkbox"/> Courtesy: internal, with co-workers	1	2	3	4	
<input type="checkbox"/> Courtesy: external, with customers	1	2	3	4	
<input type="checkbox"/> Decision-making abilities	1	2	3	4	
<input type="checkbox"/> Drive	1	2	3	4	
<input type="checkbox"/> Enthusiasm	1	2	3	4	
<input type="checkbox"/> Health and physical condition	1	2	3	4	
<input type="checkbox"/> Initiative	1	2	3	4	
<input type="checkbox"/> Morale	1	2	3	4	
<input type="checkbox"/> Reliability	1	2	3	4	
<input type="checkbox"/> Self-control	1	2	3	4	
<input type="checkbox"/> Stamina	1	2	3	4	

Section 1 Score: No. of boxes checked _____ Max score* _____ Min score* _____ Section score _____

2. Job & Product Knowledge

	Poor	Fair	Good	Exc	Comments
<input type="checkbox"/> Knows the product/service	1	2	3	4	
<input type="checkbox"/> Knows competing products	1	2	3	4	
<input type="checkbox"/> Knows market conditions	1	2	3	4	
<input type="checkbox"/> Knows customers and prospects	1	2	3	4	
<input type="checkbox"/> Knows advertising and sales aids	1	2	3	4	
<input type="checkbox"/> Knows prices, terms, and conditions	1	2	3	4	
<input type="checkbox"/> Knows company policies	1	2	3	4	

Section 2 Score: No. of boxes checked _____ Max score* _____ Min score* _____ Section score _____

3. Personal Organization

	Poor	Fair	Good	Exc	Comments
<input type="checkbox"/> Customer records in order	1	2	3	4	
<input type="checkbox"/> Has income goal	1	2	3	4	
<input type="checkbox"/> Knows how many calls to make for each sale	1	2	3	4	
<input type="checkbox"/> Knows how much time to spend on a sale	1	2	3	4	
<input type="checkbox"/> Organizes work in advance.....	1	2	3	4	
<input type="checkbox"/> Territory is organized	1	2	3	4	
<input type="checkbox"/> Makes good use of waiting time	1	2	3	4	
<input type="checkbox"/> Uses a personal organizer or time-mgmt tool	1	2	3	4	
<input type="checkbox"/> Automobile is clean and organized	1	2	3	4	
<input type="checkbox"/> Literature is current, clean, and available	1	2	3	4	

Section 3 Score: No. of boxes checked _____ Max score* _____ Min score* _____ Section score _____

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*See "Using & Scoring the Checklist" on page 4)

Sales Skills Coaching Checklist

1. Pre-call Preparation

	Poor	Fair	Good	Exc	
<input type="checkbox"/> Understands customer's business	1	2	3	4	Comments
<input type="checkbox"/> Sets call objectives	1	2	3	4	
<input type="checkbox"/> Sets sales call agenda	1	2	3	4	
<input type="checkbox"/> Has overall account strategy	1	2	3	4	
Section 1 Score:	No. of boxes checked_____	Max score*_____	Min score*_____	Section score_____	

2. Opening the Sale

	Poor	Fair	Good	Exc	
<input type="checkbox"/> Got customer's attention	1	2	3	4	Comments
<input type="checkbox"/> Established rapport.....	1	2	3	4	
<input type="checkbox"/> Set appropriate business tone	1	2	3	4	
<input type="checkbox"/> Kept the sale moving along	1	2	3	4	
Section 2 Score:	No. of boxes checked_____	Max score*_____	Min score*_____	Section score_____	

3. Qualifying Prospects

	Poor	Fair	Good	Exc	
<input type="checkbox"/> Gained interest	1	2	3	4	Comments
<input type="checkbox"/> Used open-ended questions	1	2	3	4	
<input type="checkbox"/> Encouraged customer to talk	1	2	3	4	
<input type="checkbox"/> Used questions to develop needs	1	2	3	4	
<input type="checkbox"/> Listened to the customer's responses	1	2	3	4	
<input type="checkbox"/> Used customer's responses to develop needs	1	2	3	4	
<input type="checkbox"/> Developed needs that we can satisfy	1	2	3	4	
<input type="checkbox"/> Determined who the decision makers are	1	2	3	4	
<input type="checkbox"/> Determined timing of final decision	1	2	3	4	
<input type="checkbox"/> Determined financial limits and/or restraints	1	2	3	4	
<input type="checkbox"/> Uncovered competitive situation	1	2	3	4	
<input type="checkbox"/> Kept control of the sale	1	2	3	4	
Section 3 Score:	No. of boxes checked_____	Max score*_____	Min score*_____	Section score_____	

4. Selling Benefits

	Poor	Fair	Good	Exc	
<input type="checkbox"/> Linked features & benefits to stated needs	1	2	3	4	Comments
<input type="checkbox"/> Knew at least 5 appropriate facts & benefits	1	2	3	4	
<input type="checkbox"/> Used sales tools	1	2	3	4	
<input type="checkbox"/> Used appropriate evidence	1	2	3	4	
<input type="checkbox"/> Kept the customer involved in the sale	1	2	3	4	
<input type="checkbox"/> Was aware of buying signals	1	2	3	4	
Section 4 Score:	No. of boxes checked_____	Max score*_____	Min score*_____	Section score_____	

5. Demonstrations

	Poor	Fair	Good	Exc	
<input type="checkbox"/> Knew how to demonstrate the product/service ...	1	2	3	4	Comments
<input type="checkbox"/> Demonstration was applicable to the sale	1	2	3	4	
<input type="checkbox"/> Got and kept the customer involved	1	2	3	4	
Section 5 Score:	No. of boxes checked_____	Max score*_____	Min score*_____	Section score_____	

*See "Using & Scoring the Checklist" on page 4)

6. Handling Objections

	Poor	Fair	Good	Exc	Comments
<input type="checkbox"/> Understood the customer's concern	1	2	3	4	
<input type="checkbox"/> Put concerns in the proper perspective	1	2	3	4	
<input type="checkbox"/> Had a ready answer for common objections	1	2	3	4	
<input type="checkbox"/> Acknowledged objection before handling it	1	2	3	4	
<input type="checkbox"/> Used appropriate techniques	1	2	3	4	

Section 6 Score: No. of boxes checked_____ Max score*_____ Min score*_____ Section score_____

7. Motivating the Customer

	Poor	Fair	Good	Exc	Comments
<input type="checkbox"/> Understood how product benefits customer	1	2	3	4	
<input type="checkbox"/> Able to verbalize how customer will benefit	1	2	3	4	

Section 7 Score: No. of boxes checked_____ Max score*_____ Min score*_____ Section score_____

8. Closing the Sale

	Poor	Fair	Good	Exc	Comments
<input type="checkbox"/> Knew when to stop selling & start closing	1	2	3	4	
<input type="checkbox"/> Used at least one trial close	1	2	3	4	
<input type="checkbox"/> Attempted at least one close	1	2	3	4	
<input type="checkbox"/> Knows more than one closing technique	1	2	3	4	

Section 8 Score: No. of boxes checked_____ Max score*_____ Min score*_____ Section score_____

9. After the Sale

	Poor	Fair	Good	Exc	Comments
<input type="checkbox"/> Terminated the sale at an appropriate time	1	2	3	4	
<input type="checkbox"/> Has a clear understanding of the next step	1	2	3	4	
<input type="checkbox"/> Has a follow-up plan or procedure	1	2	3	4	

Section 9 Score: No. of boxes checked_____ Max score*_____ Min score*_____ Section score_____

10. Prospecting

	Poor	Fair	Good	Exc	Comments
<input type="checkbox"/> Asked for referrals	1	2	3	4	
<input type="checkbox"/> Keeps a current list of suspects and prospects	1	2	3	4	

Section 10 Score: No. of boxes checked_____ Max score*_____ Min score*_____ Section score_____

11. Company Specific

	Poor	Fair	Good	Exc	Comments
(Use this section to list your own specific points for evaluation.)					
<input type="checkbox"/> _____	1	2	3	4	
<input type="checkbox"/> _____	1	2	3	4	
<input type="checkbox"/> _____	1	2	3	4	
<input type="checkbox"/> _____	1	2	3	4	
<input type="checkbox"/> _____	1	2	3	4	

Section 11 Score: No. of boxes checked_____ Max score*_____ Min score*_____ Section score_____

Total Score: No. of boxes checked_____ Max score*_____ Min score*_____ Total score_____

*See "Using & Scoring the Checklist" on page 4)

Additional Notes & Observations:

Strengths:

Areas for Improvement:

Plan for Improvement:

Instructions

Introduction

Don't confuse *teaching* with *coaching*. Too many sales managers fail to make the distinction between these two roles. *Teaching* is "show and tell." *Coaching* is "observe and build."

Teaching is something you do before you set the salesperson loose on a prospect. It's best done in the confines of your office or in formal training sessions, although some companies use the "blind-leading-the-blind" technique where they send a new salesperson out with a more seasoned one — often with interesting results.

Coaching, on the other hand, is best done in the field, after salespeople know what they are *supposed* to do. It's a way to build on the strengths that a salesperson brings to your company. You may never be able to get rid of a person's weak points, but you can build up his or her strong points so that the weak ones become small in comparison.

Guidelines for Curb-Side Coaching

- Curb-side coaching should be done immediately before or after the call.
- The best place is in the salesperson's car, while it's parked. Turn the motor off and turn your minds on!
- Don't make a big deal of it. Coaching should be something that you do naturally and that the salesperson expects you to do in your role as sales manager. The important thing is to do it systematically and properly.
- Whenever possible, confine the coaching to just one point or idea. Don't overwhelm the salesperson.
- Don't feel obligated to coach. If there are no particular points to be made, don't make any. Simply compliment the salesperson on a strength you noticed and get on with the next call.

- When doing corrective coaching, always start with a positive — something that the salesperson did right. After you make your point, finish on another positive note. The idea is to keep the salesperson's attitude as positive as possible while helping him to build his selling skills.
- Before the call, help the salesperson set some call objectives. Help him develop the habit of putting his mind in gear before opening the car door.
- After the call, compare the pre-call objectives with the actual call results. Help her determine what follow-on activity would be appropriate.
- Ask the salesperson what, if anything, he or she would have done differently during the call. Why?

Using & Scoring the Checklist

1. While you can use one checklist to evaluate several calls with a salesperson, we recommend using one checklist per call.
2. Use the *Comment* area for observations on the section rather than a line item.
3. Scoring can be done either section by section or for the whole checklist.
4. Put a check mark in the box beside each line item being evaluated.
5. Rate the salesperson's performance 1, 2, 3, or 4.
6. Multiply the number of checked line-item boxes by 4. This is the maximum score the salesperson can attain.
7. Multiply the number of checked line-item boxes by 3. This is the minimum score the salesperson should attain.
8. Total the salesperson's score and compare against the numbers in steps 6 and 7.