

## Sales Call – Coaching Checklist

For all items you discuss, use a basic list of evaluation e.g.:  
5=excellent, 4=good, 3=basic, 2=can improve, 1=need correction.

Item to evaluate	1	2	3	4	5	Comments
<u>Preparation</u>						
Well prepared customer information						
Agenda – venue, contents, participants, time						
Presentation material well prepared						
Clear Objective with the meeting						
On time and calm arrival						
<u>Contact</u>						
Proactive – initiative from Rep						
Icebreaker – establish rapport						
<u>Presentation</u>						
Time agreed – confirmed agenda with customer						
Personal Presentation						
Customer committed to the meeting and agenda						
Company presentation – allows to go to Needs						
<u>Needs and Implication</u>						
Customer engaged and interested in dialogue						
Our rep follow Strategy for meeting						
Questions used (open/closed/leading)						
Talking Balance Customer - Sales Rep						
Sales Reps listen and understand						
Sales Rep captures buying signals						
Summarizing and paraphrasing the needs						
ACCEPT from the customer before presentations						
<u>Argumentation</u>						
Needs clear and understood connection to Solution						
Presentation solution						
Proof for the solution presented well?						
ACCEPT from the customer?						
<u>Handling objections &amp; questions</u>						
which attitude from Sales Rep to objections & questions?						
prepared responses - handle objections & questions?						
objection handling follows guidelines - sales training?						
<u>Closing/Commitment</u>						
Reached objective – exceeded?						
Adequate pressure for decision or commitment						
Summary – next steps and solution						
ACCEPT from customer – next step and solution						
Meeting climate at the end – enthusiastic, irritated or tired?						
<u>Afterwork</u>						
Contact report – to customer within 24 hours						
CRM updated?						
was the offer, orders, other documents prepared and sent in right time?						

### Discuss the Sales Efficiency – how is time spent

In connection with the Sales calls you can also discuss some items related to efficiency (how time is planned and distributed). Example on items can be:

- length of visits
- travel planning
- visit time and place
- routines for writing contact reports, offers etc
- other items relating to personal efficiency and sales effectivity