SalesCoach Report

Coach: Anja Adminilia | Coachee: Coach 1 | Proficiency Level: Learner

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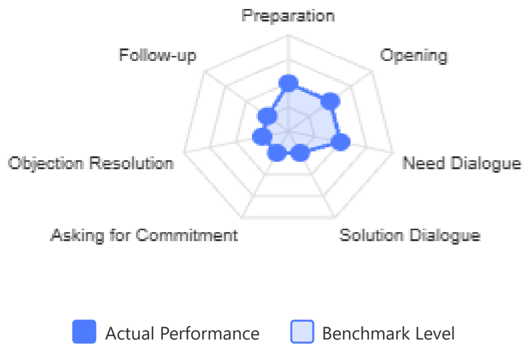
Context:

No context provided



1. Preparation

Qualified

Strategic Preparation

- ☐ Prepares (ad-hoc) a call objective
- ☐ Prepares a SMART call objective
- ☐ Has both short and long term objectives identified for that customer
- ☐ Plans calls a week ahead
- ☐ Formulates the open questions, that should be raised within a call
- ☐ Prepares a call agenda
- ☐ Defines key/directive questions, that should be raised within a call
- ☐ Uses information about the adaptation ladder
- ☐ Focuses on genuinely meeting customer needs, demonstrating curiosity from the HCPs perspective

Client Understanding

- ☐ Enters call with little or no review of the previous call notes / history
- ☐ Has reviewed previous call notes / sales history in CRM
- ☐ Makes assumptions about client needs
- ☐ Demonstrates awareness and knowledge of competitor activities
- ☐ Is always aware of the environment and collects relevant information to use in the call (observes patients, secretary)

Tactical Preparation

- ☐ Chooses fitting promo materials
- ☐ Chooses the features and benefits to focus on
- ☐ Checks the iPad before the visit (presentation, charge)
- ☐ Prepares a hook / hinge
- ☐ Plans how to respond to objections and how to position alternatives
- ☐ Plans the call individually, anticipating questions which will be asked, choosing materials and solutions to position and options for closing
- ☐ Prepares individual solutions that will demonstrate added value for the customer

2. Opening **Qualified**

Greeting & Introduction

- [ ] Introduces themself & the organisation
- [ ] Calls the doctor by name
- [ ] Mentions the reason for the visit
- [ ] Demonstrates effective presence: interest, conviction, appropriate energy (through body language)
- [ ] Is a recognized, trusted contact for the customer

Relating

- [ ] Creates a positive atmosphere (friendly, smiling, well-presented, polite)
- [ ] Understands various customer personality styles (insight colors)
- [ ] Shows flexibility in own style to meet different customer personality styles
- [ ] Creates a trusting client relationship through presence, charisma and a high level of customer\technical, market knowledge

Summary & Hinge

- [ ] Summarises by recapping the last agenda
- [ ] Creates interest with a catchy hook / hinge
- [ ] Positions the purpose of the visit and the benefits for the customer to create interest through the opening statement
- [ ] Raises an issue / challenge which is relevant for the customer (and for which we have a solution), the potential impact on them and the needs that it creates

Agenda Introduction

- [ ] Takes cues from the customer for timing and checks it
- [ ] Checks the relevance of the agenda and asks the customers for input to the meeting agenda
- [ ] Builds credibility and provides content
- [ ] Positions the wish to ask questions to help focus on the client's needs

3. Need Dialogue **Qualified**

Questioning

- [ ] Asks questions to gather information about current situation (HCP`s potential)
- [ ] Explores HCP`s satisfaction with the current situation (what is going well, what should change)
- [ ] Asks questions about the level of commitment
- [ ] Uses questioning techniques (prefacing/drilling down/trading) to create a need dialogue
- [ ] Uses a combination of different question types and techniques to appropriately expand the dialogue
- [ ] Uncovers and understands the hidden needs

Active Listening

- [ ] Uses verbal and non-verbal reinforcement
- [ ] Paces questions effectively (keeps silent after asking a question, avoids multiple-choice questions, asks one question at time)
- [ ] Listens attentively
- [ ] Listens to the needs in detail, to understand, not to respond (effective listening)
- [ ] Uses answer as a hinge

4. Solution Dialogue **Learner**

Structuring

- ☐ Provides an overview of what is about to be said
- ☐ Introduces the solution without giving details or checking
- ☐ Shares a relevant key message for the solution
- ☐ Delivers a well-thought-out individually tailored message and a solution for the specific HCP`s challenges

Positioning Solution

- ☐ Uses promotional materials in line with the brand strategy
- ☐ Supports the presentation by using iPAD content
- ☐ Uses visual aids appropriately and selectively
- ☐ Easily navigates the iPAD content
- ☐ Links to needs using features and benefits
- ☐ Offers a solution as a reaction to the prior conversation
- ☐ Offers a solution by including value adding features and benefits (added value could be expertise, service, network etc)
- ☐ Delivers a win-win solution that makes the HCP view them as a trusted advisor

Checking

- ☐ Asks a basic checking question only once
- ☐ Asks basic checking questions throughout the dialogue: how does it sound? What do you think about it?
- ☐ Summarises client benefits
- ☐ Concisely summarises and checks for agreement
- ☐ Actively uses silence

5. Asking for Commitment **Learner**

Summarizing

- ☐ Summarises the focus product information
- ☐ Positions the closing summary by reinforcing key benefits and value
- ☐ Acknowledges the value of the discussion
- ☐ Links the close to the adapted call objective
- ☐ Summary takes into account the individualized value proposition

Asking for Commitment

- ☐ Is aware of buying signals (both verbal & non verbal), which indicate that it is time to 'ask for commitment'
- ☐ Does a final check for feedback on what has been positioned
- ☐ Gets the commitment on the concrete next steps (for specific patients)
- ☐ Has convinced the HCP with our solution and has agreed on the concrete next steps (by asking implementation questions: who, what, where, when)
- ☐ The next steps are in line with the SMART objective

Maintaining Rapport

- ☐ Continues with a positive atmosphere
- ☐ Demonstrates appreciation for the client's business
- ☐ Creates a favourable last impression
- ☐ Summarises feelings and attitudes as well as facts and arguments
- ☐ Personalises the Close
- ☐ Is genuine

6. Objection Resolution — Learner

Objection Handling

- ☐ Knows the objection handling model and partly uses it
- ☐ Acknowledges to reduce any customer negativity
- ☐ Has prepared for multiple possible objections
- ☐ Handles common objections
- ☐ Uses the objection handling model consistently
- ☐ Probes to identify the underlying need
- ☐ Remains calm even with difficult objections
- ☐ Keeps the dialogue interactive, even if the objection is not resolved
- ☐ Anticipates most objections
- ☐ If an objection was not resolved, guarantees to give the answer to the client in the next call

7. Follow-up — Learner

Analysing Results

- ☐ Analyses the call results (was the call objective reached?) under manager`s guidance
- ☐ Self-critically analyses the call results (what went well? what should be improved?)
- ☐ Adjusts / sets a SMART call objective for the next call
- ☐ Develops a plan to improve / enhance the outcome of the visits
- ☐ Execute on agreements (all action steps)

Self-Analysing

- ☐ Analyses the call for strong points and areas for improvement under manager`s guidance
- ☐ Self-critically analyses the call for strong points and areas for improvement
- ☐ Provides suggestions for improvement in selling skills
- ☐ Develops a plan to improve selling skills

Reporting

- ☐ Takes notes to record the most important information (during or after a call)
- ☐ Keeps a record of all commitments in one place
- ☐ Keeps a record of all commitments and checks it on a regular basis
- ☐ Uses the call notes to update planning documentation and customer database
- ☐ Uses CRM

Key Observations:

notes

What Worked Well:

notes

What Can Be Improved:

None recorded

Next Steps:

None recorded

Coach:

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Anja Adminilia
Date: __________

Coachee:

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Coach 1
Date: __________

Electronic signatures accepted for digital approval