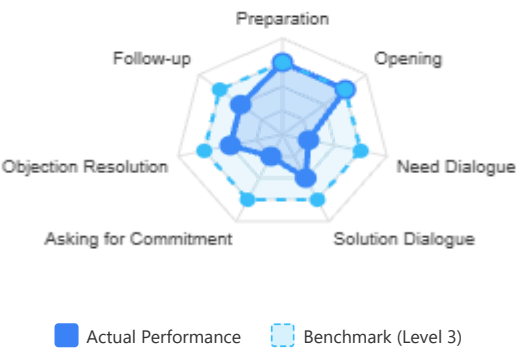


Context:

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1. Preparation

Experienced

Strategic Preparation

- ☐ L1. Prepares (ad-hoc) a call objective
- ☐ L1. Plans calls a week ahead
- ☐ L1. Formulates the open questions, that should be raised within a call
- ☐ L2. Prepares a SMART call objective
- ☐ L2. Prepares a call agenda
- ☐ L2. Defines key/directive questions, that should be raised within a call
- ☐ L3. Has both short and long term objectives identified for that customer
- ☐ L3. Uses information about the adaptation ladder
- ☐ L4. Focuses on genuinely meeting customer needs, demonstrating curiosity from the HCPs perspective

Client Understanding

- ☐ L1. Enters call with little or no review of the previous call notes / history
- ☐ L2. Has reviewed previous call notes / sales history in CRM
- ☐ L2. Makes assumptions about client needs
- ☐ L3. Demonstrates awareness and knowledge of competitor activities
- ☐ L4. Is always aware of the environment and collects relevant information to use in the call (observes patients, secretary)

Tactical Preparation

- ☐ L1. Chooses fitting promo materials
- ☐ L1. Chooses the features and benefits to focus on
- ☐ L1. Checks the iPad before the visit (presentation, charge)
- ☐ L2. Prepares a hook / hinge
- ☐ L2. Plans how to respond to objections and how to position alternatives
- ☐ L3. Plans the call individually, anticipating questions which will be asked, choosing materials and solutions to position and options for closing
- ☐ L4. Prepares individual solutions that will demonstrate added value for the customer

### Greeting & Introduction

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- ☐ L1. Introduces themselves & the organisation
- ☐ L2. Calls the doctor by name
- ☐ L2. Mentions the reason for the visit
- ☐ L3. Demonstrates effective presence: interest, conviction, appropriate energy (through body language)
- ☐ L4. Is a recognized, trusted contact for the customer

### Relating

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- ☐ L1. Creates a positive atmosphere (friendly, smiling, well-presented, polite)
- ☐ L2. Understands various customer personality styles (insight colors)
- ☐ L3. Shows flexibility in own style to meet different customer personality styles
- ☐ L4. Creates a trusting client relationship through presence, charisma and a high level of customer\technical, market knowledge

### Summary & Hinge

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- ☐ L1. Summarises by recapping the last agenda
- ☐ L2. Creates interest with a catchy hook / hinge
- ☐ L3. Positions the purpose of the visit and the benefits for the customer to create interest through the opening statement
- ☐ L4. 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

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- ☐ L1. Takes cues from the customer for timing and checks it
- ☐ L2. Checks the relevance of the agenda and asks the customers for input to the meeting agenda
- ☐ L3. Builds credibility and provides content
- ☐ L4. Positions the wish to ask questions to help focus on the client's needs

## 3. Need Dialogue

## Learner

### Questioning

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- ☒ L1. Asks questions to gather information about current situation (HCP's potential)
- ☒ L2. Explores HCP's satisfaction with the current situation (what is going well, what should change)
- ☒ L2. Asks questions about the level of commitment
- ☒ L3. Uses questioning techniques (prefacing/drilling down/trading) to create a need dialogue
- ☐ L4. Uses a combination of different question types and techniques to appropriately expand the dialogue
- ☐ L4. Uncovers and understands the hidden needs

### Active Listening

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- ☒ L1. Listens attentively
- ☒ L2. Uses verbal and non-verbal reinforcement
- ☒ L3. Paces questions effectively (keeps silent after asking a question, avoids multiple-choice questions, asks one question at a time)
- ☐ L3. Uses answer as a hinge
- ☐ L4. Listens to the needs in detail, to understand, not to respond (effective listening)

**Structuring**

- ☐ L1. Provides an overview of what is about to be said
- ☐ L2. Introduces the solution without giving details or checking
- ☐ L3. Shares a relevant key message for the solution
- ☐ L4. Delivers a well-thought-out individually tailored message and a solution for the specific HCP's challenges

**Positioning Solution**

- ☐ L1. Links to needs using features and benefits
- ☐ L2. Uses promotional materials in line with the brand strategy
- ☐ L2. Supports the presentation by using iPad content
- ☐ L2. Offers a solution as a reaction to the prior conversation
- ☐ L3. Uses visual aids appropriately and selectively
- ☐ L3. Easily navigates the iPad content
- ☐ L3. Offers a solution by including value adding features and benefits (added value could be expertise, service, network etc)
- ☐ L4. Delivers a win-win solution that makes the HCP view them as a trusted advisor

**Checking**

- ☐ L1. Asks a basic checking question only once
- ☐ L2. Asks basic checking questions throughout the dialogue: how does it sound? What do you think about it?
- ☐ L3. Summarises client benefits
- ☐ L3. Actively uses silence
- ☐ L4. Concisely summarises and checks for agreement

**Summarizing**

- ☐ L1. Summarises the focus product information
- ☐ L2. Positions the closing summary by reinforcing key benefits and value
- ☐ L3. Acknowledges the value of the discussion
- ☐ L4. Links the close to the adapted call objective
- ☐ L4. Summary takes into account the individualized value proposition

**Asking for Commitment**

- ☐ L1. Is aware of buying signals (both verbal & non verbal), which indicate that it is time to 'ask for commitment'
- ☐ L2. Does a final check for feedback on what has been positioned
- ☐ L3. Gets the commitment on the concrete next steps (for specific patients)
- ☐ L4. Has convinced the HCP with our solution and has agreed on the concrete next steps (by asking implementation questions: who, what, where, when)
- ☐ L4. The next steps are in line with the SMART objective

**Maintaining Rapport**

- ☐ L1. Continues with a positive atmosphere
- ☐ L2. Demonstrates appreciation for the client's business
- ☐ L2. Personalises the Close
- ☐ L2. Is genuine
- ☐ L3. Creates a favourable last impression
- ☐ L4. Summarises feelings and attitudes as well as facts and arguments

## 6. Objection Resolution

Qualified

### Objection Handling

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- ☒ L1. Knows the objection handling model and partly uses it
- ☒ L2. Acknowledges to reduce any customer negativity
- ☒ L2. Handles common objections
- ☐ L3. Has prepared for multiple possible objections
- ☐ L3. Uses the objection handling model consistently
- ☐ L3. Probes to identify the underlying need
- ☐ L4. Remains calm even with difficult objections
- ☐ L4. Keeps the dialogue interactive, even if the objection is not resolved
- ☐ L4. Anticipates most objections
- ☐ L4. If an objection was not resolved, guarantees to give the answer to the client in the next call

## 7. Follow-up

Qualified

### Analysing Results

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- ☒ L1. Analyses the call results (was the call objective reached?) under manager's guidance
- ☒ L2. Self-critically analyses the call results (what went well? what should be improved?)
- ☒ L2. Execute on agreements (all action steps)
- ☒ L3. Adjusts / sets a SMART call objective for the next call
- ☐ L4. Develops a plan to improve / enhance the outcome of the visits

### Self-Analysing

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- ☒ L1. Analyses the call for strong points and areas for improvement under manager's guidance
- ☒ L2. Self-critically analyses the call for strong points and areas for improvement
- ☒ L3. Provides suggestions for improvement in selling skills
- ☐ L4. Develops a plan to improve selling skills

### Reporting

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- ☒ L1. Takes notes to record the most important information (during or after a call)
- ☒ L1. Uses CRM
- ☒ L2. Keeps a record of all commitments in one place
- ☒ L3. Keeps a record of all commitments and checks it on a regular basis
- ☐ L4. Uses the call notes to update planning documentation and customer database

**Key Observations:**

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**What Worked Well:**

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**What Can Be Improved:**

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**Next Steps:**

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Coach:

Coach 1

Date: \_\_\_\_\_

Coachee:

Anja Adminilia

Date: \_\_\_\_\_