

# SalesCoach Report

Coach: Tester 1 |

Coachee: Tester 1 |

Proficiency Level: Qualified

6.6.2025

## Context:

context tester 1

## 1. Preparation

Learner

### Strategic preparation

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

### Technical 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

## Experienced

### Greeting & introduction

Introduces themselves & 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 him\her 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 Dialog

Experienced

#### 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

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

### 4. Solution Dialog

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 challenge

#### Positioning solution

- ' Links to needs using features and benefits
- ' Offers a solution as a reaction to the prior conversation
- Uses promotional materials in line with the brand strategy
- Supports the presentation by using iPad content
- Offers a solution by including value adding features and benefits (added value could be expertise, service, network etc)
- Uses visual aids appropriately and selectively
- Easily navigates the iPad content
- 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 do you think about it?
  - Summarises client benefits
- ' Actively uses silence
  - Concisely summarises and checks for agreement

## 5. Objection Resolution

### Learner

### Objection handling

- ' Knows the objection handling model and partly uses it
- ' Acknowledges to reduce any customer negativity
- ' Handles common objections
- ' Has prepared for multiple possible objections and uses the objection 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 solved, guarantees to give the answer to the client in the next call

## 6. Asking for Commitment

### Qualified

### 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 HCP commits to try the solution with a number of patients

### **Maintaining rapport**

Continues with a positive atmosphere

Demonstrates appreciation for the client's business

Personalises the Close

Is genuine

Creates a favourable last impression

Summarises feelings and attitudes as well as facts and arguments

## **7. Follow up**

## **Master**

### **Analyzing 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?)

Execute on agreements (all action steps)

Adjusts/Sets a SMART call objective for the next call

Develops a plan to improve/enhance the outcome of the visits

### **Self-analyzing**

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

Gives suggestions for improvement in selling skills

Develops a plan to improve selling skills

### **Reporting**

Makes notes to record the most important information (during or after a call), uses CRM

Keeps a record of all commitments in one place

Keeps a record of all commitments in one place and checks it on a regular basis

Uses the call notes to update planning documentation and customer database

**Key Observations:**

key observations tester 1

**What Worked Well:**

well 1

**What Can Be Improved:**

improved 1

**Next Steps:**

next 1

**Electronic Signatures**

Coach Signature:

Date:

Tester 1

Coachee Signature:

Date:

Tester 1

*Note: This document supports electronic signatures for digital approval.*