SalesCoach Report

Context:

context tester 1

---

1. Preparation   Learner

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 HCP's 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)

Technical 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

2. Opening   **Experienced**

Greeting & introduction

L1: Introduces themself & 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

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

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 him\her and the needs that it creates

Agenda introduction

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 Dialog   Experienced

Questioning

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, uncovers and understands the hidden needs

Active listening

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 time)
L3: uses the answer as a hinge
L4: Listens to the needs in detail, to understand, not to respond (effective listening)

4. Solution Dialog   Learner

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 challenge

Positioning solution

L1: Links to needs using features and benefits

L2: Offers a solution as a reaction to the prior conversation

L2: Uses promotional materials in line with the brand strategy

L2: Supports the presentation by using iPAD content

L3: Offers a solution by including value adding features and benefits (added value could be expertise, service, network etc)

L3: Uses visual aids appropriately and selectively

L3: Easily navigates the iPAD content

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

5. Objection Resolution   Learner

Objection handling

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 and 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 solved, guarantees to give the answer to the client in the next call

6. Asking for Commitment   Qualified

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 HCP commits to try the solution with a number of patients

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

7. Follow up   Master

Analyzing results

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-analyzing

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: Gives suggestions for improvement in selling skills

L4: Develops a plan to improve selling skills

Reporting

L1: Makes notes to record the most important information (during or after a call), uses CRM

L2: Keeps a record of all commitments in one place

L3: Keeps a record of all commitments in one place and checks it on a regular basis

L4: 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.