SalesCoach Report

Context:

context tester 1

Proficiency Overview:

Spider Graph

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.