Sales Checklist^{TM} Report

Generated on November 24, 2025

Customer	Test Company	**Deal Stage**	Discovery
Opportunity	Big Deal	**Session Date**	2025-11-24 09:00

Overall Score

<div align="center">

0/100 AT RISK

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Items Validated: 0/92   Completion: 0%

Category Breakdown

Category	Score	Status
Trigger Event & Impact	0%	Needs Work
Trigger Priority	0%	Needs Work
Sales Target	0%	Needs Work
Decision Influencer	0%	Needs Work
Individual Impact	0%	Needs Work
Mentor	0%	Needs Work
Decision Making Process	0%	Needs Work
Fit	0%	Needs Work
Alternatives	0%	Needs Work
Our Solution Ranking	0%	Needs Work

Coaching Feedback

Though the overall score indicates significant gaps in your sales approach with the Test Company opportunity, remember, every call is a chance to learn and improve. It's clear we need to focus on understanding and leveraging the sales process more effectively. Starting with identifying and understanding the trigger events and their impacts on the customer will help you prioritize your opportunities more effectively. Learning about the decision-making process and who the influencers are can greatly enhance how you tailor your solution to the customer's needs. While no specific strengths were identified in this call, it's important to remember that improvement is always possible and that each area of feedback is a step toward your next success. Your ability to receive this feedback and act on it will be your strength moving forward. Let's focus on turning these challenges into opportunities for growth.

Action Items for Next Call:

1. For the next call, research the customer's recent trigger events and prepare how your solution addresses the impacts of these events.

2. Identify the decision-making process at the customer's company and tailor your next pitch to appeal to the key influencers.

3. Prepare a customized presentation of your solution, focusing on how it specifically addresses the identified needs and pain points of the customer.

Checklist Details

Trigger Event & Impact

Item	Status
Trigger Event & Impact - Part 1	N/A
Trigger Event & Impact - Part 2	N/A
Assessing Impact and Results	N/A
Understanding the Source	N/A
Stakeholder Impact	N/A
Action Planning	N/A
Strategic Coaching Prompts	N/A
Trigger Event & Impact - Item 8	N/A
Trigger Event & Impact - Item 9	N/A
Trigger Event & Impact - Item 10	N/A

Trigger Priority

Item	Status
Trigger Priority - Part 1	N/A
Trigger Priority - Part 2	N/A
Mentor Leverage	N/A
Action Plan if Gaps Exist	N/A
Trigger Priority - Item 5	N/A
Trigger Priority - Item 6	N/A
Trigger Priority - Item 7	N/A
Trigger Priority - Item 8	N/A

Sales Target

Item	Status
Sales Target - Part 1	N/A
Sales Target - Part 2	N/A
Sales Target - Item 3	N/A
Sales Target - Item 4	N/A
Sales Target - Item 5	N/A
Sales Target - Item 6	N/A

| Sales Target - Item 7 | N/A |
| Sales Target - Item 8 | N/A |

Decision Influencer

Item	Status
Decision Influencer - Part 1	N/A
Utilizer Identification	N/A
Finalizer Identification & Engagement	N/A
Coaching Questions	N/A
Decision Influencer - Item 5	N/A
Decision Influencer - Item 6	N/A
Decision Influencer - Item 7	N/A

Individual Impact

Item	Status
Individual Impact - Part 1	N/A
Individual Impact - Item 2	N/A
Individual Impact - Item 3	N/A
Individual Impact - Item 4	N/A
Individual Impact - Item 5	N/A
Individual Impact - Item 6	N/A
Individual Impact - Item 7	N/A
Individual Impact - Item 8	N/A

Mentor

Item	Status
Mentor - Part 1	N/A
Mentor - Part 2	N/A
Mentor - Item 3	N/A
Mentor - Item 4	N/A
Mentor - Item 5	N/A
Mentor - Item 6	N/A
Mentor - Item 7	N/A
Mentor - Item 8	N/A

Mentor - Item 9	N/A
Mentor - Item 10	N/A
Mentor - Item 11	N/A
Mentor - Item 12	N/A

Decision Making Process

Item	Status
Decision Making Process - Part 1	N/A
Decision Making Process - Part 2	N/A
Decision Making Process - Part 3	N/A
Decision Making Process - Item 4	N/A
Decision Making Process - Item 5	N/A
Decision Making Process - Item 6	N/A
Decision Making Process - Item 7	N/A
Decision Making Process - Item 8	N/A
Decision Making Process - Item 9	N/A
Decision Making Process - Item 10	N/A
Decision Making Process - Item 11	N/A
Decision Making Process - Item 12	N/A

Fit

Item	Status
Fit - Part 1	N/A
Fit - Part 2	N/A
Fit - Part 3	N/A
Fit - Part 4	N/A
Fit - Part 5	N/A
Fit - Part 6	N/A
Fit - Item 7	N/A
Fit - Item 8	N/A
Fit - Item 9	N/A
Fit - Item 10	N/A

Alternatives

Item	Status
Alternatives - Part 1	N/A
Alternatives - Part 2	N/A
Coaching Questions - Internal and Competitive Options	N/A
Coaching Questions - Differentiation and Positioning	N/A
Coaching Questions - Mentor Leverage and Action Planning	N/A
Alternatives - Item 6	N/A
Alternatives - Item 7	N/A
Alternatives - Item 8	N/A

Our Solution Ranking

Item	Status
Our Solution Ranking - Part 1	N/A
Our Solution Ranking - Part 2	N/A
Mentor Leverage	N/A
Action Plan if Gaps Exist	N/A
Our Solution Ranking - Item 5	N/A
Our Solution Ranking - Item 6	N/A
Our Solution Ranking - Item 7	N/A
Our Solution Ranking - Item 8	N/A
Our Solution Ranking - Item 9	N/A