

G/O Digital –Sales Coaching Feedback Form

Sales Rep: Noa Gibson
Manager: David Haar
Date: 11.15.13
Appointments: Sunchain Tanning (7 Locations)

G/O Sales Process

Sales Process	How Did You Do?	Coaching Notes
Prospecting	<ul style="list-style-type: none"> • Create Geo/Territory/Vertical Lead Gen Plan • Identify & research targets • Follow-up on Demand Gen leads • Initiate contact with target prospects • Introduce digital marketing, GDMS and create interest 	As far as prospecting goes, this is a GREAT lead to be working. There are so many different products we can be presenting to them based on how many locations they have and the clientele that is utilizing their service. Great job getting us in front of Brandi. We know she is not the ultimate decision maker but it sounds like based on our meeting with her, she'll pass along a couple of our good ideas!
Preparation	<ul style="list-style-type: none"> • Research business and current advertising • Prepare questions to ask • Prepare product solution recommendation based on knowledge 	I would say that your preparation for this call we pretty good! You knew how many locations they had, you knew Brandi's role in the company, etc. Things I would always make sure you knew before going into a meeting would be: doe they have a strong website. What does their Facebook page look like? Are they buying Google AdWords? Who is the ultimate decision maker if it's not the person we're meeting with?
Customer Discovery/ Identify Needs	<ul style="list-style-type: none"> • Explore/uncover: <ul style="list-style-type: none"> ○ Business issue ○ Current state ○ Desired state ○ Key players ○ Competition • ID impact/pain of current situation • Confirm customer decision process • Test Initial Value Prop 	I think on this meeting, we didn't do the best job of doing really thorough needs analysis at the beginning of the conversation. It kind of felt like a lot of "Do you do this?" "Do you do that?" questions. Early in the meeting it's always a best practice to ask those open-ended questions about their business, their marketing efforts, their competition, etc. The more we learn about the company, the easier it will be to get them to sign on the dotted line.

Identifying/Recommending Solutions	<ul style="list-style-type: none"> • Confirm Customer's Key Requirements • Present discovery findings, best practice recommendations and our Value Prop • Define deal parameters • Uncover & manage objections • Review business impact with Economic buyer 	<p>This merchant certainly is already doing a lot in the digital space and there are several things that we may not be able to sell them at this point. Based on the questions we asked, we uncovered a couple of great things that could get them excited about working with us. For them, I think getting Brandi on AZ Midday to talk about Sunchain and get them onto SimplyGifted is a great start. From there, we now have a working relationship and can work on getting additional products like e-mail marketing.</p>
Proposal	<ul style="list-style-type: none"> • Map solutions to key customers requirements • Bundle "Solution" recommendation (multi-product) <ul style="list-style-type: none"> ○ DC/GL Integrated Solution bundles ○ GL integrated solution bundles • Present solution to decision maker/ economic buyer 	<p>Because Brandi was not the ultimate decision maker, there wasn't an opportunity to get them on board right then and there. Next steps, you'll need to craft a really good e-mail recapping what we talking about and showing them what we can do via our partnership with The AZ Republic and KPNX. If you'd like, feel free to send me a first draft of the e-mail you plan on sending them and we can put our heads together to make sure it's compelling.</p>
Executing Contract	<ul style="list-style-type: none"> • Configure financial terms, billing, contract terms and revenue split • Negotiate final agreement • Agreement signed • Submit to Deal Quality & Scheduling for approval (DC only) • Initiate Billing 	<p>N/A due to the fact that Brandi was not able to sign any agreements for the owners.</p>
Onboard (Future)	<ul style="list-style-type: none"> • Sales captures client on-boarding information • On-boarding Call 	<p>N/A dues to the fact that Brandi was not able to sign any agreements for the owners.</p>
Expand Relationship (Future)	<ul style="list-style-type: none"> • Request reference • Cross-sell new opportunities • Awareness of customer activity & satisfaction • Support renewal process+ 	<p>I think our next steps here are we need to make sure Brandi still sees us as a great potential business partner and I would keep hammering her for the contact information of the people that will be making this decision. We can only go so far w/ Brandi in the middle. We need to get in front of the actual decision makers.</p>

Sales Rep Post-Observation Coaching Questions (fill in rep responses below)

- **What specifically did you feel you did well? What specifically could you improve moving forward?**

I feel like I asked the right questions and built value in our products. I need to set the agenda at the beginning of every sales call.

- **Did you utilize all steps of the sales process? Which could you have spent more time on to make your business conversation more effective?**

Yes. Set an agenda at the beginning and ask more open-ended questions.

- **How many questions did you ask and how did you use the information that was given to you? Any others you would add next time for this type of business?**

I don't remember how many questions I asked but I asked the correct ones and used them to create a solution that makes sense for the business. No.

- **Could the merchant reiterate the value of G/O Digital? Did you bore the merchant or leave him or her with remaining questions?**

Absolutely. Definitely did not bore the merchant and by the time the meeting ended she had a working knowledge of how we can help the business.

- **What did the close look like? Was it a hard or a soft close? If you didn't close on the spot, what is the concrete follow up step?**

There was no close as this was not the ultimate decision maker. Send an email and follow up later on this week.

Coaching Feedback

What the sales rep did well:

Getting a meeting with this type of client is great! 7 locations is no joke and we know their demographic is utilizing digital resources when making a buying decision.

I would say you did a pretty good job of asking some exploratory questions. Asking about seasonality was good!

Opportunities to grow skills:

I think we can dive much deeper involving the questioning part of the meeting. You did ask some good questions that opened Brandi up for conversation. As the meeting started to wind down, I didn't feel as though we had probed enough and that was when I jumped in and started asking about other aspects of their business. I think if we had left the meeting before we did that 2nd round of probing, we wouldn't have had much to be optimistic about with this client. After we talked about our relationship with KPNX, Brandi really got excited and seems eager to get her decision makers on board with us!

Still not using an iPad in the field. I know you had mentioned that your iPad is not charging. If you are having any issues with any of your company issued hardware or software, please let me know ASAP so that you can have all of the tools that every AE has and is in place to ensure success.

I like that fact that you are able to secure a meeting with a client like this and I think overall, that was a pretty good meeting. Where I would ask that you continue to focus your energies at this point is more activity that's going to get you that 1st deal. We need more meetings like this and ideally, we need more meetings like this with the actual decision maker. Once you get approximately ten (10) of those per week, you'll find the deals will come in!