

G/O Digital –Sales Coaching Feedback Form

Sales Rep: Wendy McDaniel
Manager: David Haar
Date: 11.27.13
Appointments: Door Knocking

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 	Seeing as this was a door knocking day, not a lot to add about prospecting. I think some big takeaways from today are that we can be knocking on just about everyone's doors when it comes to the products that we offer. Some industries will certainly lend itself to having money to spend more than others. Today, I think we saw a good cross-section of potential merchants and we made a good use of our 2-3 hours together in the field!
Preparation	<ul style="list-style-type: none"> • Research business and current advertising • Prepare questions to ask • Prepare product solution recommendation based on knowledge 	Because these were pop-ins, we didn't have a lot of research on hand. The good things about today is that we can now go back and do lots of research and get ready for the meetings that you set as well as do some good research to get Anytime Fitness on board for some social.
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 	We did some of this today with the dentist and Anytime Fitness. Not in its purest form seeing as we were trying to get meetings but I think we did a pretty good job. Did a good job of doing some initial discovery with the charter school as well!
Identifying/Recommen ding 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 	N/A dues to the fact that this was a door-knocking day.

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 	N/A due to the fact that this was a door-knocking day.
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 	N/A due to the fact that this was a door-knocking day.
Onboard (Future)	<ul style="list-style-type: none"> • Sales captures client on-boarding information • On-boarding Call 	N/A due to the fact that this was a door-knocking day.
Expand Relationship (Future)	<ul style="list-style-type: none"> • Request reference • Cross-sell new opportunities • Awareness of customer activity & satisfaction • Support renewal process+ 	N/A due to the fact that this was a door-knocking day.

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 think my approach when introducing myself and David went well (at different locations) when cold calling. I obtained information about their business and then obtaining an appointment for next week worked at a couple places. Set 2 appointments for next week. Talking about the products we offer to help them.

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

I did get some needs on some of the cold calls. I could have researched more before going inside to meet the business owners and employees.

- **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?**
3 to 4 asking about their business and how they get customers into their business, then briefly talked about how we can help them with some in addition to what they are doing already. I would get further into the needs process: current state, desired stated, how it is effecting them now not having a larger presence or what would it mean to them if questions.
- **Could the merchant reiterate the value of G/O Digital? Did you bore the merchant or leave him or her with remaining questions?**
Not really because these were all cold calls. I think they had some questions to think about and that's a good thing.
- **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?**
No closes. N/A. Follow up appointment.

Coaching Feedback

What the sales rep did well:

As I mentioned when we were in the car, I like your “this is my territory” approach to door knocking and getting meetings via popping in on businesses. I know we set a couple of meetings and I think the 2-3 hours we spent in the field drumming up business was productive!

I love that you have lots of “warm” leads that you can be calling on from your Yellow Pages days. I would keep tapping into those people that you have worked with in the past like a Mesa Sales client and I think you’ll be able to get some deals from the people that already have had a working relationship with you. It’s always great to get those new job kinks worked out on the people you already know versus the big fish you’re looking to score.

Opportunities to grow skills:

I think it would be good to get your “walk-in” intro down a little smoother. How you mention who you are and what company your with and what that company does will help to get to the manager or decision maker a little bit better and in turn, result in more sales. I’m a big fan of having compelling info. Loaded onto the iPad as well to get the meeting so feel free to let me know if you are looking for any tips and tricks as to what would be good to have loaded up on there.

I know it was the WED before Thanksgiving so F2F meetings were not that easy to come by. Next time I put some time on your calendar, I look forward to joining you on a couple of initial discovery meetings.