**G/O Digital –Sales Coaching Feedback Form**

**Sales Rep: Kelly Sales Rep**

**Manager: Kati Manager**

**Date: 09.16.13**

**Appointments: 4 - Candy Creations, Tom Colins Ford, Bella Cucina, and Bookhouse Pub**

**G/O Sales Process**

|  |  |  |
| --- | --- | --- |
| **Sales Process** | **How Did You Do?** | **Coaching Notes** |
| Prospecting | * 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 | * Great job identifying the prospects and setting 4 appointments during our time together * Make sure to entice the merchants and attain commitment for a specific time and date to meet with you to prevent no-shows. A good way to do that is to create interest on the phone by asking them some questions. For example:   + Describe your overall marketing approach?   + How do you ensure you are targeting your marketing activities to where your new customer’s look for services like yours? |
| Preparation | * Research business and current advertising * Prepare questions to ask * Prepare product solution recommendation based on knowledge | * Scan the business website and overall online presence to see how active they are on via digital marketing today. * Make sure to prepare your discovery questions ahead of time to ensure you are asking the right questions to identify needs and recommend necessary solutions in your appointments. |
| Customer Discovery/  Identify Needs | * Explore/uncover:   + Business issue   + Current state   + Desired state   + Key players   + Competition * ID impact/pain of current situation * Confirm customer decision process * Test Initial Value Prop | * In the Tom Colins Ford appointment, when the owner asked, “Show me what you’ve got.” Instead of jumping right into products, make sure to reset expectations and let them know “I will be sure to show you everything we have, but first I’d like to learn a little bit about your business. Then I’ll answer and all questions you have for me about G/O Digital and how we can partner with you moving forward.” * Make sure to reference your G/O sales process doc for question ideas! For example:   + What are your 3 biggest challenges to achieving those goals? |
| Identifying/Recommending Solutions | * 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 | * Great job illustrating who we are, what we do, and tailoring your solutions based on their needs you uncovered during the discovery * When the Bella Cucina mentioned she thought that all Search Engine-type companies were the same, you did an excellent job clarifying to understand and showing proof of our capabilities at G/O Digital with case studies and our premier partnership with Google. You expanded the conversation back to fulfillment and how we have a team of certified individuals that work as an extension of their marketing teams. Great sound bite! |
| Proposal | * Map solutions to key customers requirements * Bundle ”Solution” recommendation (multi-product)   + DC/GL Integrated Solution bundles   + GL integrated solution bundles * Present solution to decision maker/ economic buyer | * Based on the needs of the business, great job explaining how we can solve their issues with our digital solutions. * Make sure to set a specific date and time that you are going to follow up with the business with your contact/audit.   + “I’ll call you on Tuesday at 2:00pm to send, review and answer questions you have before you sign the contract.” |
| Executing Contract | * 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 | * Make sure to ensure you have the correct DM to sign the agreement:   + How do contracts typically flow through your organization for signature? |
| Onboard (Future) | * Sales captures client on-boarding information * On-boarding Call | TBD |
| Expand Relationship (Future) | * Request reference * Cross-sell new opportunities * Awareness of customer activity & satisfaction * Support renewal process+ | TBD |

**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?
* Did you utilize all steps of the sales process? Which could you have spent more time on to make your business conversation more effective?
* 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?
* Could the merchant reiterate the value of G/O Digital? Did you bore the merchant or leave him or her with remaining questions?
* 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?

**Coaching Feedback**

Three things the sales rep did well:

1. Filling your schedule with 4 *qualified* appointments for our time together
2. Following the steps to handle objections with the business, making sure they understood the value of working with G/O Digital.
3. Mapping solutions back to key customer requirements. You did a great job of actively listening to customer responses during discovery and used that information to recommend a tailored solution. Great work!

Opportunities to grow skills:

1. Bring your list of questions with you so that you don’t forget to ask them along the way, ensuring your gather all necessary information for the business
2. Set concrete follow-up time to either review your audit or have the business sign the contract
3. Make sure to always ask your discovery questions before jumping into products. As mentioned above, even when the merchant is being pushy, it’s important to take control and ask questions first.

**Other Notes & Additional Suggestions:**

* Great job! I’m looking forward to seeing these deals in your pipeline in SFDC very soon, and the stages changing based on the process above. Go get ‘em!