

## Initial Call Coaching Observational Checklist

Please use the following checklist to evaluate the extent to which the Salesperson successfully executed the segment assigned. Responses are based on the following 5-point scale:

**5 = Strongly Agree:** *Completely addresses requirements; no modifications needed*

**4 = Agree:** *Addresses most requirements; minor modifications needed*

**3 = Neutral:** *Generally addresses requirements; some modifications needed*

**2 = Disagree:** *Few requirements addressed; significant modifications needed*

**1 = Strongly Disagree:** *Does not meet our requirements at all*

Please also indicate any additional comments or feedback in the **Comments** areas

<b>Presenter:</b>	<b>Observer:</b>
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Area	Level				
Coaching Focus	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
<input type="checkbox"/> Completed pre-call plan for the call	1	2	3	4	5
<input type="checkbox"/> Opened the call referencing the invitation and phone conversation	1	2	3	4	5
<input type="checkbox"/> Asked the prospect what would make this meeting a great meeting for them	1	2	3	4	5
<input type="checkbox"/> Effectively used the SMA drill down questions to uncover compelling reason for this meeting	1	2	3	4	5
<input type="checkbox"/> Utilized conversation techniques: rule of 3R, drilling down to get to the real question, IZE, free-spooling	1	2	3	4	5
<input type="checkbox"/> Asked what the pain was costing them	1	2	3	4	5
<input type="checkbox"/> Eliminated the incumbent	1	2	3	4	5
<input type="checkbox"/> Anticipated and effectively handled questions from the prospect	1	2	3	4	5
<input type="checkbox"/> Anticipated and handled curveballs effectively	1	2	3	4	5
<input type="checkbox"/> Asked if prospect wanted to fix the problem	1	2	3	4	5
<input type="checkbox"/> Established clear next steps	1	2	3	4	5
<b>Comments</b>					