**Curbside Critique**

**After each appointment 1** = needs improvement  **5** = Excellent

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **General** | **1** | **2** | **3** | **4** | **5** | **Comments** |
| **Appearance** |  |  |  |  |  |  |
| **Pre-call planning** |  |  |  |  |  |  |
| **On time** |  |  |  |  |  |  |
| **Establish appropriate rapport** |  |  |  |  |  |  |
| **Reviewed reason for appointment** |  |  |  |  |  |  |
| **Set agenda and time expectations** |  |  |  |  |  |  |
| **Was convincing and in command** |  |  |  |  |  |  |
| **Interested & source of information** |  |  |  |  |  |  |
| **Comfortable & confident** |  |  |  |  |  |  |
| **Analysis** | **1** | **2** | **3** | **4** | **5** | **Comments** |
| **Developed needs through probing** |  |  |  |  |  |  |
| **Seek us tell** |  |  |  |  |  |  |
| **Uncovering concerns, problems** |  |  |  |  |  |  |
| **Develop impact** |  |  |  |  |  |  |
| **Close on needs** |  |  |  |  |  |  |

Continued on next page…**Curbside Critique, continued**

**After each appointment 1** = needs improvement  **5** = Excellent

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Presentation** | **1** | **2** | **3** | **4** | **5** | **Comments** |
| **Founded reason(s) for presentation** |  |  |  |  |  |  |
| **Obtained agreement/commitment** |  |  |  |  |  |  |
| **Showed product knowledge** |  |  |  |  |  |  |
| **Translated features into benefits** |  |  |  |  |  |  |
| **Presentation in order/organized** |  |  |  |  |  |  |
| **Bridged needs/wants to presentation** |  |  |  |  |  |  |
| **Discussed ROI** |  |  |  |  |  |  |
| **Addressed all questions** |  |  |  |  |  |  |
| **Handled objections** |  |  |  |  |  |  |
| **Asked and handled competition** |  |  |  |  |  |  |
| **Ask for close** |  |  |  |  |  |  |
| **Debriefing** | **1** | **2** | **3** | **4** | **5** | **Comments** |
| **Open to feedback** |  |  |  |  |  |  |
| **Participating in feedback session** |  |  |  |  |  |  |
| **Understood sales cycle** |  |  |  |  |  |  |
| **Comments:** |  | | | | | |

**Running Effective Coaching Sessions, 1 of 2 pages**

* **Preparation**
  + Review tools/ gather information
    - Pipeline
    - Call Statistics
    - Activity statistics
    - Monthly results
    - Personal and Corporate goals
  + Determine focus for upcoming session
  + Customize agenda to individual needs
  + Develop probing questions to uncover needs / gaps
* **Activities**
  + Head check - determine mental state - willing, committed and able
  + Ask for their agenda
  + State your agenda
  + Review prior session's key objectives / accomplishments
  + Uncover gaps - triage
  + Review current pipeline
  + Discuss goals and strategies
  + Address open items (service, competition, career path)
  + Create action plan / focus areas for upcoming month
* **Find opportunities to:** 
  + Coach
  + Council
  + Provide feedback
  + Roll play
  + Brainstorm
  + Strategize
  + Encourage
  + Transfer knowledge
* **Improving Planning Sessions** 
  + Ask team for feedback
    - Positive
    - Constructive
  + Have your manager sit in on planning sessions
  + Sit in on other managers planning sessions
  + Create a proper environment
  + Understand what you and associate want to accomplish
  + Customize agenda

**Running Effective Coaching Sessions, 2 of 2 pages**

* **Avoiding Obstacles to conducting planning sessions**
  + Scheduling conflicts
  + Too many topics
  + Not enough time
  + Crisis
  + Lack of preparation
  + Interruptions
  + Poor agenda
  + Operational issues
  + Phone Calls
  + Fatigue
  + Setting poor expectations
  + Remote sales associates
* **What the Sales Associate Wants to Accomplish**
  + Recognition
  + Strategies on specific accounts
  + Career planning
  + Honest and open feedback
  + Help with issues
  + Review compensation plan
  + One to One training
  + Action plan for next session
  + To "vent" and be "heard"
  + Be motivated and encouraged
  + How do you think I am doing?
  + Pre-call planning

**Coaching Session Form and Email Recap**

Coaching Form for (NAME ): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Next Session (DATE): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Coach’s Agenda

1. Get update on recent activity
2. Review target industries
3. Pipeline planning

Participant’s agenda

1. Recap recent closes
2. Discuss step on pending business
3. Help to get appointment with ABC Company

Review progress on last week’s goals \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Congratulations on recent closes\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

30/60/90 Day Goals

30 day goals – Work toward December 31 goal, focus on specific vertical(s)

60 day goals – Create to 25 prospecting list

90 day goals – Revenue projection update

What is working? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What isn’t working? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Obstacles facing\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Review pipeline report\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Review strategies for upcoming appointments\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Review upcoming week’s prospects\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Goals for upcoming week\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_