

Coaches Checklist

Performance Plan



Creating Sales Excellence

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Coaches Checklist

Date of Observation: _____

Salesperson Name: _____

Building Relationships / Results Oriented Selling					
<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
Salesperson does not spend time on the right activities.	1	2	3	4	5
The salesperson just wants to sell a deal not a relationship with the prospect.	1	2	3	4	5

Additional Notes: _____

Questioning & Proactive Listening					
<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
Is asking predominately closed questions.	1	2	3	4	5
Only asks a minimum number of questions. Typically, they are the same questions over and over again.	1	2	3	4	5
He/she is not using %ie downs.+	1	2	3	4	5
Does not appear to be listening effectively.	1	2	3	4	5
The salesperson's body language conveys the impression that they are not interested in the prospect.	1	2	3	4	5

Additional Notes: _____

Why People Buy

<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
Is not asking questions to uncover the reasons why a given prospect might be buying.	1	2	3	4	5

Additional Notes: _____

First Impressions

<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
When answering a telephone inquiry the Salesperson does not do any of the following:					
• Use attention grabbing openers	1	2	3	4	5
• Gain information, name and phone number	1	2	3	4	5
• Establish rapport	1	2	3	4	5
Attire does not meet (or barely meets) with your dress code.	1	2	3	4	5
Does not greet prospects warmly, with good eye contact and a smile.	1	2	3	4	5
Requests sensitive information prior to building any sort of relationship with the prospect.	1	2	3	4	5

Additional Notes: _____

Qualifying the Prospect

<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
Does not uncover DMCs well or at all.	1	2	3	4	5
Does not handle non-qualified prospects well.	1	2	3	4	5

Additional Notes: _____

Presenting

<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
Presents the same to all decision-makers.	1	2	3	4	5
Does not recognize how a prospect will make a decision.	1	2	3	4	5
Salesperson presents more features than benefits.	1	2	3	4	5
Does not respond to sales supporting responses from the prospect.	1	2	3	4	5
Does not position his/her offering with a USP.	1	2	3	4	5

Additional Notes: _____

Proposals

<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
Proposals are in poor condition/disorganized	1	2	3	4	5
His/her presentations are poor. The Salesperson seems uncomfortable delivering the presentation.	1	2	3	4	5
Loses control of the material during a presentation.	1	2	3	4	5

Additional Notes: _____

Demand Creation System

<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
Does not understand the sequence of events in the Demand Creation System.	1	2	3	4	5
Is reluctant to make calls selling prospects appointments.	1	2	3	4	5

Demand Creation System

What to Look for:	Improvement Needed				
	Yes				No
Customers frequently say %no+to meeting with him/her when contacted by phone.	1	2	3	4	5
Has difficulty breaking through the %voicemail wall.+	1	2	3	4	5
Says that prospects are not interested in his/her offer.	1	2	3	4	5

Additional Notes: _____

Closing

What to Look for:	Improvement Needed				
	Yes				No
Does not close.	1	2	3	4	5
Does not respond well to closing objections.	1	2	3	4	5
Does not close well.	1	2	3	4	5
Prospects do not say %yes+or %no.+	1	2	3	4	5

Additional Notes: _____

Questioning & Proactive Listening

What to Look for:	Improvement Needed				
	Yes				No
Does not address <u>all</u> objections raised by the prospect.	1	2	3	4	5
Handles objections poorly.	1	2	3	4	5

Additional Notes: _____

Negotiation for Success

<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
Loses negotiation when competition is a factor.	1	2	3	4	5
Is too quick to give away %freebies+when cost is a factor in the negotiation.	1	2	3	4	5
Is losing negotiations when price becomes an issue.	1	2	3	4	5

Additional Notes: _____

Following Up

<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
Does not ask for referrals.	1	2	3	4	5
Asks for referrals, but does not follow up on them.	1	2	3	4	5

Additional Notes: _____

Time / Activity Management

<i>What to Look for:</i>	<i>Improvement Needed</i>				
	Yes				No
Is always busy but busy doing the wrong activities.	1	2	3	4	5
Never seems to have enough time to complete the critical activities.	1	2	3	4	5

Additional Notes: _____

What the Salesperson is doing well:	How can that be built upon?

Areas of Improvement:	Action Plan to Improve:

Manager: _____

Salesperson: _____

Sales Management Review Checklist

Date: _____

Office: _____ Sales Manager: _____

- Activity quotas are in place..... _____
- Revenue/growth quotas are in place _____
- Executive marketing program is in place _____
- Account stack ranking is completed _____
- Rep stack ranking is reviewed regularly..... _____
- Monthly activity planners are being utilized _____
- Recruiting program is active..... _____
- S.O.F.T. reporting is active and accurate _____
- Manager is maintaining skills training program..... _____
- Sales forecast is accurate and reviewed frequently..... _____
- Field coaching occurs regularly and is documented _____
- Manager complies with activity objectives _____
- Salespeople comply with activity objectives _____
- All team members know and use a one-minute monologue _____
- Win/loss/postpone reporting is current and accurate..... _____
- Sales skills role-play is satisfactory _____
- Activity levels exceed objectives..... _____
- Office appearance is professional and satisfactory _____
- Sales job descriptions are in writing and measurable..... _____
- Sales vehicles are professional and well-maintained _____
- Sales time maximization is in place _____
- Large account reviews are current _____
- All salespeople have written sales plans _____
- Activity tracking system is in place _____
- All major marketing events are on calendar and assigned _____
- Appropriate use of vendor reps/resources is noted _____
- Specialized business development is in place..... _____
- Sales compensation rewards for desired performance..... _____