

# CALL COACHING STRATEGIC PLANNING FORM

Plan out your strategic approach to help make sure call coaching happens. Start with your highest priority reps and the minimum number of sessions you can complete / month (be sure your total monthly sessions is equal to the total hours you can commit / month). Use this chart to make your plan and the empty calendar template on page 2 to plan your month.

| Category | Number of Reps | Frequency | Monthly Coaching Sessions | My Reps           |
|----------|----------------|-----------|---------------------------|-------------------|
| Sample   | 3              | 3 / month | 9                         | Tina, Steve, Mike |
| <b>B</b> |                |           |                           |                   |
| <b>N</b> |                |           |                           |                   |
| <b>A</b> |                |           |                           |                   |
| <b>C</b> |                |           |                           |                   |
| <b>D</b> |                |           |                           |                   |
| TOTAL    |                |           |                           |                   |

| FACTOR 8 RECOMMENDATION                                  |             | MY WEEKLY CALENDAR |  |
|--|-------------|--------------------|--|
| <b>B / N</b>   | 3-4 / month | <b>WK 1</b>        |  |
| <b>A/C</b>   | 2-3 / month | <b>WK 2</b>        |  |
| <b>D</b>   | 1 / month   | <b>WK 3</b>        |  |
| Adjust to fit your total available time before planning! |             | <b>WK 4</b>        |  |

## CALL COACHING STRATEGIC PLANNING FORM

Use this page to plan your month. Add rep names to each day, then compare this page against your existing calendar. Do regularly-scheduled meetings conflict? Is the first week full of Performance 1:1 meetings and too full? Do end-of-month sessions get cancelled to close deals? After your reality check, add this to your digital calendar. Once you're informed your team, send out invites (remember to include what they need to bring!). If you hit all your commits in the first month, make your invites recurring and try to add more sessions!

[illegible]

**Need Call Coaching Training For Your Team?**  
Call (480)-630-5318 or email [info@factor8.com](mailto:info@factor8.com)

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