

VIRTUAL MEETING, TRAINING & COACHING TIPS

Meeting

Presentation of new information.

WHO, WHAT, WHY focused.
Company line. Leader led.

One way + Q&A.

Training

Developing new skills and behaviors. (Heavy lifting).

HOW and WHERE focused.
DO IT focused. Practice.

Learner led / facilitated.

(Call) Coaching

Custom feedback on skill application to improve skills & confidence.

WHEN and HOW focused.

A call is present. 1:1 to 3:1. 2-way.
Question-based.

Virtual Meeting Interaction Tips

- 1 Ask for video (you want to see!)
- 2 Have teams close email and chat
- 3 Encourage rep screen shares too
- 4 Set expectations for participation
- 5 Ask for chat, hands, or call by name
- 6 Add a break
- 7 PAUSE for answers (count to ten)
- 8 "What questions do you have" vs. "Any questions"

Virtual Training Ideas

- 1 Train together with a team schedule (e.g. 1 / week)
- 2 Add team interaction: pre & post calls & chat
- 3 Pre call: set post-training expectations
- 4 Post call: Discuss, take actions, give examples
- 5 Add application: role play, individual messaging
- 6 Add reality: customer scenarios
- 7 Add post-training challenges: best script, call
- 8 Focused call coaching for the period

Need Call Coaching Training For Your Team?

Call (480)-630-5318 or email info@factor8.com

CALL COACHING CHEAT SHEET

Virtual Call Coaching Tips

- 1 Schedule it – drive by's won't work now!
- 2 Get strategic – WHY and WHAT are you coaching? Goal?
- 3 Define good in a scorecard / keyword tracker
- 4 Use systems to quickly surface good / bad calls
- 5 Combine synchronous and asynchronous (recording)

I have recordings:

- 1 Download calls first for better playback (rep)
- 2 Zoom video works best
- 3 Pick calls BEFORE coaching session (rep)
- 4 Choose call sections based on goal (rep)

I don't have recordings:

- 1 Schedule joint calls (stay on mute) + post-call coaching
- 2 Role play (2:1 for triad coaching)

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