

| Step Name | Content & Example |
|-------------------------------------|--|
| Clarify Expectations | Based on our conversation last time, I'm expecting to hear you opening up the gatekeepers and gaining information. |
| Observed Behavior | I heard you try at least three techniques to build rapport with her. Nice job. |
| Ask Questions | Why do you think you were shut down? What else have you tried? What will you do next? What do we need to work on? |
| Commit To Action/Improvement | I love your suggestion to ask for the sales department the next time you get shut down by the gatekeeper. That should help you get something of value out of each call. We all know how much sales people like to talk, right? |
| How Can I Help? | What would help you work on this? Want to practice? |
| Next Steps | I want you to complete this WINS form with our focus area and email it to me by end of day. We'll meet up again next week same time. |



RULE OF THUMB?

Rule of thumb: When the rep gives, it lives. If you decide, it dies.

How Do I Decide What To Coach?

- | | |
|---|--|
| 1 Impact on the business / \$ | 3 Customer Impression (Branding, will they take the call next time?) |
| 2 Impact on the outcome of the call (why did it die?) | 4 Rep Choice – (THIS WILL ALWAYS BE STRONGEST) |

Talk in Questions!

- How do you think that call went?
- What do you think was the customer's point of view?
- What do you think you could work on to help you most increase your number?
- What are you going to do to work on that?
- How can I help?

Be Ready To Roll This Up To Your Boss:

- Top 3 skill gaps on your team
- Ideas based on customer feedback
- Who isn't progressing & you're ready to move to corrective action / terminate
- Resources needed for coaching coverage
- Ramp progress / strength of newbies

WHAT'S THE DIFFERENCE?

| | SKILL COACHING | PERFORMANCE COACHING | COUNSELING |
|------------------------------------|--|--|--|
| PURPOSE | Focus on one specific skill at a time to develop skills | Focus on overall performance to goals/objectives; review past and create future strategic/tactical plan | To address company policy violations or not achieving sales results repeatedly |
| WHAT DOES IT LOOK LIKE | Ex: Rep isn't asking effective questions. Focus on improving that skill. Meet 1:1 or as a Team | Ex: Rep is significantly below his revenue goal for quarter; Look at all factors influencing results and make a plan | Rep is late 2-3 times per week and takes long lunches. Meet in private and involve HR after 2nd infraction |
| WHEN (HOW OFTEN) SHOULD IT HAPPEN? | Regular, pre-defined intervals (weekly, biweekly, monthly) | Regular, pre-defined intervals (monthly, quarterly, annually) Meet in private | As needed to address specific issues |
| DOCUMENTING THE SESSION | Call QA Tracking and Coaching WINS Forms | Rep File | Rep File and possibly HR File |
| ACTIONS / FOLLOW-UP | WINS Forms | Document actions for each in file | Document actions for each in incident in the file. Schedule follow up session for 1-4 weeks. |