

Field Sales Coaching Checklist

Sales Person: _____ Date: _____

Client: _____ Location: _____

Coaching Objective: _____

Sales Pre Call Planning:		
Identified Decision Makers	Identified Influencers	Identified Needs
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
The Call Objective: _____		

Opening and Introduction: (Greeting, Rapport Building, and Transition)

Identification of Client's Needs: (Did they identify and address the clients needs?)

Product positioning: (How well did they present the products capabilities and key benefits addressing the clients needs?)

Questioning and Listening Skills: (How was the depth and range of the questions?)

Ability to handle objections:

Understanding of the competition: (Was the competition identified and acknowledged?)

Meeting the objective, the close: (How were major & minor closes used and was a clear next step established?)

Notes: _____
