Sales Coaching Session
Cheat Sheet

Checklist before the session:

Skill - Based

- [x] Identify skill gaps
- [x] Observe reps during their customer meetings/calls
- [x] Review the emails
- [x] Identify the struggles through the data
- [x] Consider what will help to improve skills
- [x] Prepare the questions

Deal - Based

- [x] Review the deals
- [x] Review the details in CRM
- [x] Consider what topics to suggest to win the deal
- [x] Prepare the questions

What Questions to Ask:

- What challenges would you like to discuss? Break this down until the problem is specific.
- What do you expect to achieve? Break it down until the end goal is specific.
- What have you already tried to fix or improve it?
- What options can you think of to address it? Help stack rank them.
- When will you start and what will you do first?

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Checklist during the session:

- Actively listen
- Be relaxed
- Provide responses
- Allow reps to arrive to solutions themselves
- Role play with your sales reps
- Restate what has been said
- Show empathy
- Help explore options
- Set Goals
- Summarize

Self Reflecting Questions:

- What worked in my coaching sessions?
- What didn't work?
- What do I want to do differently next time?
- How will I track my progress and get input from others?
- Who will I ask for feedback and when?

Improve your own coaching skills:

- Shadow a manager, who is a good coach
- Choose a communication technique that needs to be improved
- Learn how other coaches get started, what they do and don't do

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