



NEOTECH

DEAL LEVEL COACHING FOR INSIDE SALES

Instructor's Guide

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Purpose

This guide is designed to help instructors prepare to deliver the Deal Level Coaching for Inside Sales course. The guide should be used to become familiar with the content, course objectives and structure of the course. Materials are also provided to help instructors understand the audience's expectations and level of expertise.

While this guide can be referenced during the course it is advisable that all material is memorized and practiced prior to facilitation to ensure it is delivered with confidence and professionalism.

Preparing to Teach

Instructor Preparation

Instructional Goal

The NEOTECH inside sales supervisors will conduct a deal level coaching session with a sales rep during a sales call using a Deal Level Coaching Form. Coaching session should be conducted with the sales rep, immediately following a sales call and include the completion of a Deal Level Coaching Form, an action plan and signed documentation of the coaching conversation.

Learner Analysis

Information Categories	Data Sources	Learner Characteristics
1. Entry behaviors	Interviews: One current supervisor and one manager.	Learners are currently conducting unstructured coaching sessions. No training has been provided to show the learners how to conduct coaching session. All Supervisors (learners) were successful sales representatives and have knowledge of the behaviors that are required to be successful as an inside sales rep.
2. Prior knowledge of topic area	Same as above.	One year ago, all supervisors were provided resources and tools to conduct coaching sessions. Learners have minimal recollection of the information that was provided.
3. Attitudes toward content	Same as above.	Supervisor and Manager both have an understanding of how coaching can help increase staff productivity. Due to their focus on increasing performance they indicated that they would be interested in assistance in bettering their coaching skills.
4. Attitudes toward potential delivery system	Same as above.	Supervisor and Manager prefer an instructor led setting. However, they would like a facilitator that has experience and developed skills as a coach rather than from the normal sales trainer.
5. Motivation for instruction (ARCS)	Same as above.	Learners are required to conduct coaching sessions making this training very <i>relevant</i> to their jobs. While all learners do have some experience coaching they are <i>confident</i> that they can learn and master new skills that will help them be better coaches. Learners will be very <i>satisfied</i> if by improving their coaching their team sales results increase. Research on coaching shows that effective coaching can increase performance up to 19% which should keep learners <i>attentive</i> during the training.
6. Educational and ability levels	Same as above.	All Supervisors are required to have at least a Bachelor's degree.

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Information Categories	Data Sources	Learner Characteristics
7. General learning preferences	Same as above.	Learners are a younger group who are comfortable in both online and instructor led courses. They are currently most comfortable with instructor led courses because that is what they are used to be provided in the workplace. They indicated that while they are uncomfortable being put on the spot in role plays they see the benefit of the instruction and actually prefer the practice they get from it.
8. Attitudes toward training organization	Interview: Manager only.	The manager indicated that the supervisors may be a bit cynical of training. The current trainer used to be a supervisor and the current supervisors look at him as a peer more than someone that can provide them additional training. However, since training has shifted under the Sales Operations umbrella with different leadership rather than just under inside sales, the manager thinks the supervisors will be positive toward the training.
9. General group characteristics	Observations	<p>Heterogeneity: Learners are about the same age and from the same geographic area. All began as inside sales reps after college and were gradually promoted to current position.</p> <p>Size: There are a total of 4 supervisors.</p> <p>Overall impressions: Learners will be open to learn new skills to better their coaching skills but instruction must come from an outside person that has proven success using the techniques.</p>

Materials

In addition to this Instructor Guide, the following materials are part of this workshop:

- PowerPoint presentation
- Flip chart, easel and markers
- Recorded Sales Call A
- Recorded Sales Call B
- Deal Level Coaching Forms
- Coaching Documentation Handout
- Feedback Form – Survey Monkey

Room Setup/Equipment

PC setup

Instructor PC only:

- Projector and projection screen
- Access to internet and intranet
- CD Player
- Speakers

Student PCs:

- Student must provide their own laptops and power cords

Room supplies

- Podium for instructor's laptop and printed materials
- Tables and chairs for participants
- Electrical outlets for participants' and instructor's laptops
- Internet access – wired or wireless

Working with the Client

Prior to the workshop

1. Notify students that they will need to bring their laptop. Send a reminder one day before the workshop.
2. Make one copy of each handout for each participant.
3. If training is offsite, notify the training facilities of the required materials and desired room set up.
4. Load PowerPoint presentation onto your laptop or a flash drive.
5. Enter feedback questions into SurveyMonkey.com

Day of instruction

1. Arrive at the training site with adequate time to prepare the room for instruction.
2. Ensure all required supplies are available.
3. Ensure the room is equipped for PC set ups.
4. Arrange seating so participants can be easily paired.
5. Set up the flipchart and easel if necessary.
6. Organize handouts.
7. Set up your PC to display the title page of the PowerPoint presentation.
8. Test the audio recording and speakers.

Workshop flow

This workshop is designed to leverage and expand on participants’ existing knowledge of coaching. The workshop begins with introductions and some slides to show participants how coaching can help various people within an organization. It then continues with a series of discussions and practice activities that are designed around a case study in the form of a real sales call. At the end of the course, participants will be assessed on their ability to actively listen to a sales call, formulate feedback and document a coaching session.

Agenda for two hour session

Type of Activity	Detail	Time	Materials
Preinstructional Activities	<ul style="list-style-type: none"> • Welcome/Introductions • Review course goals • Present motivational content 	10 minutes	<ul style="list-style-type: none"> • PowerPoint presentation
Instructional Activities	<ul style="list-style-type: none"> • Ice Breaker 	10 minutes	<ul style="list-style-type: none"> • Flip chart/ marker • Laptop for demonstrations • Recorded Sales Call A • Deal Level Coaching Form • Documentation Handout
	Content delivery for the following will include demonstrations, case studies, skill practice and feedback sessions. <ul style="list-style-type: none"> • Observe Behavior • Fill Out Coaching Form • Provide Feedback • Set Action Plan • Document Session 	80 minutes	
Wrap-up	<ul style="list-style-type: none"> • Explain Follow-through assignment and feedback form • Assessment 	20 minutes	<ul style="list-style-type: none"> • Recorded Sales Call B • Deal Level Coaching Form
Follow-Through Activities	<ul style="list-style-type: none"> • Feedback Form • Transfer 	After Instruction	<ul style="list-style-type: none"> • Electronic feedback form • Deal Level Coaching Form

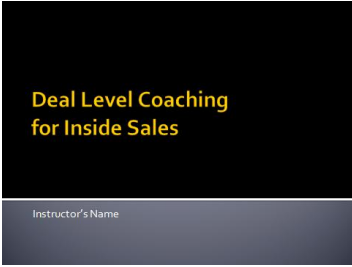
Teaching the Workshop

Preinstructional Activities

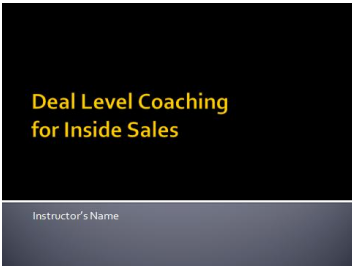
PowerPoint Presentation

Timing: 10 minutes

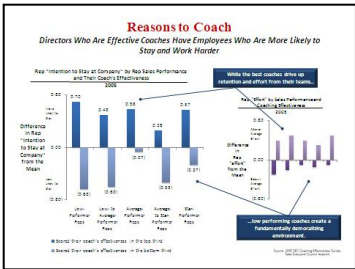
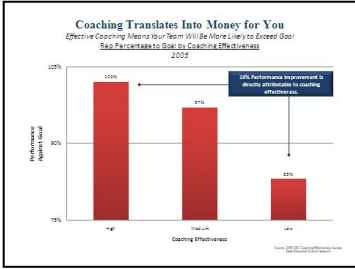
Welcome/Introductions

SHOW	DO
<p>Title slide: Keep up as participants enter the room</p>  <p>The image shows a PowerPoint title slide with a black background and yellow text that reads "Deal Level Coaching for Inside Sales". Below the title, there is a grey bar with the text "Instructor's Name".</p>	<ol style="list-style-type: none"> 1. Welcome: participants. 2. Ask: each member to provide a brief introduction of him/herself. 3. Introduce: yourself. Be sure to explain your experience with coaching to position yourself as a subject matter expert as well as a facilitator.

Course Goals

SHOW	DO
<p>Title slide</p>  <p>The image shows a PowerPoint title slide with a black background and yellow text that reads "Deal Level Coaching for Inside Sales". Below the title, there is a grey bar with the text "Instructor's Name".</p>	<ol style="list-style-type: none"> 1. Explain: the goals of the course. Let the learners know that after the course they will be able to: <ol style="list-style-type: none"> a. Recognize skills that lead to successful sales calls b. Give constructive feedback that boosts rather than deflates a reps confidence c. Develop action plans to improve rep performance d. Document coaching sessions to show the progression of employee performance 2. Explain: the format of the course. <ol style="list-style-type: none"> a. Course is designed to build on what you already know about coaching b. Course is collaborative, you will learn from each other's experiences as well as mine c. Course is designed to get you involved. You will get hands on experience evaluating a call and conducting a coaching session

Motivational Content

SHOW	DO
<p>1. Reason to Coach slide:</p>  <p>2. Coaching Translates into Money for You slide:</p>  <p><i>*Graphs from Sales Executive Council</i></p>	<ol style="list-style-type: none"> Explain: That coaching is good for the associate, the manager and the company. Show: <i>Reason to Coach</i> slide. Explain: that research from the Sales Executive Council shows that those associates that rank their coach’s effectiveness as high are more likely to stay with their company and more likely to put higher effort into their job. Show: <i>Coaching Translates into Money for You</i> slide. Explain: that the best part of coaching is that it translates into more money for you. According to the Sales Executive Council effective coaches perform on average 19% of plan better than ineffective coaches. Ask: the class to imagine what an additional 19% in performance would mean for their commission and paychecks. Tell: the class that today we are going to go over some methods that will help them become more effective coaches.

Instructional Activities

Total Timing: 90 minutes

- Flip chart with markers
- Recorded Sales Call A
- Deal Level Coaching Form
- Coaching Documentation Handout

Ice Breaker

Timing: 10 minutes

SHOW	DO
Put computer in standby mode as you will not need it for this activity. Ensure flip chart can be viewed by entire class.	<ol style="list-style-type: none"> 1. Tell: the class that you recognize that they already have experience and knowledge about coaching. Let them know you want to leverage and expand on that knowledge. 2. Ask: the class what skills they believe make a good sales rep. 3. Write: these on a flip chart piece of paper. Use as many flip chart pages as necessary. 4. Ask: the class what actions when taken help progress a sale towards closure. 5. Write: these on the flip chart in another color. 6. Hang: these around the room.

Main Instructional Activities

Timing: 15 minutes

PERFORMANCE OBJECTIVES SUBORDINATE TO STEPS 1 – 1.2
<ol style="list-style-type: none"> 1. Provided an audio recording of a sales call with a rep and a customer, observe how the rep handles the sales call by listening to the call and taking notes. Notes should include at least two observations of desirable sales behavior and one observation of behavior to improve. <ol style="list-style-type: none"> 1.1. Provided an audio recording of a sales call with a rep and a customer, listen to a sales call without other distractions such as email and phone calls. 1.2. Provided an audio recording of a sales call with a rep and a customer, take notes on your observations of the sales call with at least two observations of desirable sales behavior and one observation of behavior to improve.

DO
<ol style="list-style-type: none"> 1. Ask: the class which of the behaviors that they just came up with they think are the most influential in progressing deals? 2. Circle: the top three behaviors on the flip charts using a different color than the original ink to make it stand out. 3. Tell: the class that when you are coaching it is easy to see when a rep is going in the wrong direction but sometimes the hardest part of evaluating a call is looking for things that the rep is not doing. By

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keeping these skills and behaviors in mind you can better evaluate a reps strengths and weaknesses. You should also prioritize these top 3 behaviors since all 4 of you supervisors agreed that these were the most influential. Work on these behaviors first with a rep then move on to other skills.

4. **Instruct:** the class that you are about to play an audio recording of a sales call. What you would like them to do is to actively listen to the call and try to identify at least two desirable sales behaviors and one that needs improvement. Remind participants that behaviors are posted around the room if they need help identifying skills. Ask the class to take good notes as they listen to the call since they will only hear it once just as if it were a real call.
5. **Ask:** the class if they have any questions before proceeding.
6. **Play:** Recorded Sales Call A.
7. **Ask:** each participant to share their reactions by sharing the desirable and undesirable behaviors that they heard. After each participant shares their response ask the class if they agree/disagree with the identified sales skill.
8. As each participant shares his/her response, **ensure** that he/has has identified at least two good behaviors and one behavior that needs improvement.

Timing: 20 minutes

PERFORMANCE OBJECTIVES SUBORDINATE TO STEPS 2 – 2.1

2. Given a Deal-Level Coaching Form and a participant acting as a sales rep, complete the form by asking the rep the questions on the form and referring to your notes about the sales call without omitting any questions.
 - 2.1. Given a laptop with access to the intranet, locate the Deal-Level Coaching Form on the Leadership and Coaching Team Site, without assistance.

SHOW	DO
<p>Project the Sales Automation site from the laptop. After demonstration open and keep showing the Deal Level Coaching Form.</p>	<ol style="list-style-type: none"> 1. Tell: the class that the behaviors you just identified were skill level behaviors. If the rep improves on those behaviors their performance should improve regardless of the individual sale or deal they are working. When coaching you need to identify those skills but you also need to identify the actions that if taken will help increase the likelihood of closing the current deal and winning the business. 2. Refer: back to the second group of actions that the group has already identified in the second color on the flip charts. 3. Tell: the class that sometimes it is hard to be objective, recognize, or even remember all the steps that should be accomplished so the Deal Level Coaching Form will help guide the coaching conversation. 4. Hand out: a copy of the Deal Level Coaching Form 5. Tell: the class that an electronic copy of the Deal Level Coaching form can be found on the Sales Automation portal. 6. Demonstrate: how to access the Deal Level Coaching Form on the Sales Automation portal. Ask the class to follow along with their laptops. 7. Review: the steps on the coaching form with the class.

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	<p>8. Explain: that to use the form you simply need to ask the sales rep the questions on the form to gauge how their deal is progressing.</p> <p>9. Instruct: the class that we will now use the coaching form to assist in a coaching conversation through a role play scenario. Tell participants to pair up with the person next to them. Assign one of the participants to be the sales rep and one to be the supervisor. They will use the sales call that they just heard and conduct a coaching session using the form. The supervisor will ask the sales rep the questions on the form to get the learners familiar with how the form applies to an actual call. Learners can fill out the form manually on the hard copy or can open a form from the portal and fill it out electronically.</p> <p>10. Ask: the class if they have any questions before proceeding.</p> <p>11. Replay: Audio Recording A.</p> <p>12. Provide: pairs 10 minutes to go through the coaching form together.</p> <p>13. Observe: participants going through the conversations and provide learner guidance as necessary.</p>
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Timing: 10 minutes

PERFORMANCE OBJECTIVES SUBORDINATE TO STEPS 3 – 3.1	
3.	Given a Deal-Level Coaching Form, notes of observations from a sales call and a participant acting as a sales rep, provide a sales rep feedback, with critical feedback sandwiched between two statements of positive feedback.
3.1.	Given a completed Deal-Level Coaching Form, interpret the results of the coaching form identifying three areas of improvement based on the objectives on the coaching form.

SHOW	DO
Put computer in standby mode as you will not need it for this activity. Ensure the flip chart is visible to all participants.	<p>1. Tell: the class now that you have gone through the coaching form with the sales rep the next step is to interpret the form using the objectives provided in each stage and give feedback back to the rep.</p> <p>2. Instruct: the class that when giving feedback you should:</p> <ul style="list-style-type: none"> a. Focus on specific observable behavior b. Give direction for how the behavior should be executed c. Use supportive language to show you are there to help not punish d. Focus on no more than 3 areas of improvement e. Sandwich critical feedback between positive feedback <p>3. Write: these on the flip chart as you describe them.</p> <p>4. Instruct: the class that we will now provide feedback for the sales scenario that we have been following. In your pairs, switch your role so if you were a rep you will now be the supervisor and vice versa.</p>

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	<ol style="list-style-type: none"> 5. Give: the class a few minutes to formulate their feedback then let them role play giving feedback to each other. 6. Observe: participants going through the conversations and provide learner guidance as necessary.
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Timing: 15 minutes

PERFORMANCE OBJECTIVES SUBORDINATE TO STEPS 4 – 4.2
<ol style="list-style-type: none"> 4. Given a written account of feedback that was given to a rep, develop an action plan that is specific, measurable and actionable and has a defined timeline. <ol style="list-style-type: none"> 4.1. Given three sales behaviors that need improvement, develop action steps to improve the behavior that is specific, measurable and actionable. 4.2. Given the action steps that improve listed sales behaviors, develop a time line to complete the steps that is realistic and attainable.

SHOW	DO
<p>Flip chart</p>	<ol style="list-style-type: none"> 1. Tell: the class that giving feedback is not where coaching ends. As coaches you need to go one step further and help develop those skills. The next step is developing an action plan for the rep and a timeline to complete that plan. 2. Tell: the class that when developing an action plan those actions should include the following characteristics. Action plans should be: <ol style="list-style-type: none"> a. Specific b. Measurable c. Actionable d. Reasonable e. Time Bound 3. Write: these characteristics on the flip chart. 4. Conduct a discussion: with the class regarding what is meant by each of those characteristics. 5. Refer: back to the top three influential behaviors/skills that were identified in the first main performance objective step. 6. Ask: the class what type of action plan they would put together for a rep that did not possess those skills. 7. Instruct: the class that in pairs they should develop an action plan for the sales scenario they have been following. To conduct this activity they should use their completed Deal Level Coaching Form and notes from their feedback session with the rep. 8. Ask: the groups to share their action plan and time line with the class. 9. Provide: learner guidance if all characteristics of a good action plan are not met.

Timing: 10 minutes

PERFORMANCE OBJECTIVES SUBORDINATE TO STEPS 5 – 5.4

5. Given a completed Deal-Level Coaching Form, notes of observations from a sales call and an action plan, document the coaching session, including a copy of the coaching form, a word document with notes from the conversation and specific steps regarding the action plan and timeline.
 - 5.1. Given a completed Deal-Level Coaching Form, notes of observations from a sales call and an action plan, create a word document with notes of conversation and determined action steps that clearly defines action steps and required time for completion.
 - 5.2. Given a word document with notes from a coaching session and action plan, ask the rep to sign the word document acknowledging the coaching session and action steps, with first and last name and date of session.
 - 5.3. Given a signed word document with notes from a coaching session and action plan, make copies of the word document and coaching form for sales rep that are legible.
 - 5.4. Given the original signed word document with notes from a coaching session and action plan, file these documents in the sales rep's file. Ensure documents are in the correct rep's file and are filed according to date.

DO

1. **Instruct:** the class the documentation is an important part of coaching and employee development. By documenting coaching conversations you develop a history of reps' improvements over time which can help with future promotions and performance reviews. On the other hand, if reps are not improving you have valid documentation on the ways in which you have tried to help the reps' development.
2. **Handout:** Coaching Documentation Handout
3. **Review:** the handout with the class by describing the process for documenting a coaching session and outlining the documents required for the associate's file.
 - a. Create a word document with notes of the conversation with the rep and the determined action steps for the rep.
 - b. Ask rep to sign the word document acknowledging the coaching session and action steps.
 - c. Make copies of word document and coaching form for sales rep.
 - d. File original copies of documents in the sales rep's file. Contents should include:
 - i. Deal Level Coaching Form
 - ii. Word Document with notes from the conversation with the rep and action plan signed by the rep.
4. **Instruct:** the class to each create a word document summarizing the conversation, providing the action plan and the timeline. The case example that the class has been following will be used for this activity.
5. **Ask:** the class to compare their documents with their partners to make sure they are in agreement.
6. **Observe:** group conversation to ensure all elements were documented in each word file.

Wrap Up Activities

Recorded Sales Call B
Student Laptops
Deal Level Coaching Form
Coaching Documentation Handout

Timing: 20 minutes

Closing

DO
<ol style="list-style-type: none">1. Explain: that to ensure they get adequate practice conducting effective coaching sessions they are to submit documentation for their first three coaching sessions to their manager and to you. This should be completed in the next 30 days.2. Instruct: the class that they will be receiving a survey via email after the course. Ask that they provide honest comments to help us improve the course and that they complete it in a timely manner.

Assessment/Posttest

DO
<ol style="list-style-type: none">1. Instruct: the class that we will be doing a final assessment to see how much they have retained from the course.2. Explain: that in a moment you will play another sales call. Tell them that they are to listen to the call, complete the coaching form and remaining documentation as if they were actually conducting a coaching session with a sales rep. After they are done they should email their documentation to you and then they are free to leave. Let the class know that you will review the documents after the class is over and provide them feedback on their submission by the end of the week. Let the class know that they can use their notes, the information around the classroom and the handouts that they were provided today to complete this activity.3. Ask: if there are any questions before proceeding with the activity.4. Play: Sales Call B.5. Give: the class the remaining time to complete their documentation.

Follow- Up Activities

Electronic Feedback Form

Timing: To be completed after the course.

Student and Instructor Feedback

DO
<ol style="list-style-type: none">1. Email: the participants the electronic version of the feedback survey. In the body of the email remind the participants that they need to email documentation to their first three coaching session to both their manager and to you.2. Review: completed assessments and provide feedback to participants by the end of the week.3. Review: each person's first three coaching session's documentation as they are emailed to you within the next 30 days.

Handouts

Deal Level Coaching Form

The Deal Level Coaching form, which begins on the next page, is a form designed to help supervisors guide coaching conversations with their sales reps. Key sales behaviors and objectives have been identified to assist supervisors in developing action plans for their reps and ensuring they do not miss any critical steps to completing a deal.

DEAL-LEVEL COACHING DOCUMENT: ANATOMY OF A DEAL

Purpose: To assist in conducting productive deal-level coaching conversations with your sales representatives.

Instructions: The following stages outline the progression of a successful deal. Stages represented in red are stages where you, the DOS, should be actively involved in the deal.

1. Review the objectives of the stage.
2. Ask the sales rep the coaching questions to determine if the objectives of the stage were met.
3. Document the rep’s responses and your feedback in provided area.

DEAL INFORMATION

Sales Representative:

Date:

Customer:

Opportunities:

OPPORTUNITY IDENTIFIED




Objective: Opportunities come from a variety of sources. The lead may be an external referral, internal referral, cold call, service/billing issue, market response, user training, buy/sell or from routine account management.

Coaching Questions

1. Is the client a valid opportunity and a good fit for what we sell?

Answers:

Next Steps/Follow-up:

PRE-CALL RESEARCH	
	<p>Objective: Goal is to gather as much information as possible to prepare for the initial call. During this stage the rep should plan for the call, determine questions to be asked and shop the store.</p>
<p>Coaching Questions:</p> <ol style="list-style-type: none"> 1. What did you do to prepare for the call? 2. What tools and processes did you use? 3. What was your primary objective for the call? 	<p>Answers:</p>
	<p>Next Steps/Follow-up:</p>

INITIAL CALL	
<p>Objective: The goal of the initial call is to qualify the opportunity. There should be do discussion of product, pricing or forecasting at this point. At this point in the deal you want to determine who the ultimate decision maker is and if there is a compelling event driving the purchase. You want to verify that the deal represents a valid opportunity.</p>	
<p>Coaching Questions:</p> <ol style="list-style-type: none"> 1. What are the three most important strategic initiatives of the customer? 2. Who did you speak to? 3. Who is the ultimate decision maker? 4. Is there a compelling even driving a timeline? 5. What timeline commitment has the dealer made to a sales process? 6. What did the ultimate decision maker say to make you think this is a qualified deal? 	<p>Answers:</p>
	<p>Next Steps/Follow-up:</p>

DISCOVERY/TOTAL DEALER SPEND	
<p>Objective: During this step sales reps should identify pain > pain of change, quantify the pain, engage sales channels, identify coaches, red flags, influences and key users and begin to incorporate commercial teaching elements. This section should be about discovery and relationship building. No mention of product, pricing or forecasting should occur here. The rep should be able to confirm that the decision maker buys into R.O.P.E.</p>	
<p>Coaching Questions:</p> <ol style="list-style-type: none"> 1. Do you feel like you uncovered the customer's's underlying needs? 2. Tell me some of the questions you asked. 3. How do you know which pain is the most important? 4. What is it costing them to do nothing about the pain? 5. Have they agreed that the problem is effecting the bottom line? 	Answers:
	Next Steps/Follow-up:

SOLUTION COORDINATION	
<p>Objective: This section of the deal is about taking what you've learned and figuring out how you are going to apply it. At this point, you want to confirm that the rep's solution ties back to the identified pains. While it is not required, it is strongly suggested that you, the DOS, is involved during this stage of the deal.</p>	
<p>Coaching Questions:</p> <ol style="list-style-type: none"> 1. Tell me how you determined which solutions to present? 2. What resources and/or specialist did you involve in your solution design? 	Answers:
	Next Steps/Follow-up:

CUSTOMER SOLUTION PRESENTATION	
<p>Objective: The goal of this part of the deal is to determine if the rep presented proof to validate the solution.</p>	
<p>Coaching Questions:</p> <ol style="list-style-type: none"> 1. What objections do you expect to face? 2. Do you have a plan to overcome these objections? 3. What resources are you going to use? 4. How do you know this is the right time to present proof? 5. Have you met with your resources (MSR, RSM, etc.) to share discovery and make a game plan? 	<p>Answers:</p>
	<p>Next Steps/Follow-up:</p>

CONFIGURATION	
<p>Objective: This step is to finalize the no price proposal and to present it to the dealer. This meeting should set the expectation that the next meeting is a closing meeting.</p>	
<p>Coaching Questions:</p> <ol style="list-style-type: none"> 1. Is the proposal professional? 2. Does it include the following: <ul style="list-style-type: none"> • Why ADP • Review of findings • Value proposition • How we will uniquely solve their problems • What the solutions mean to the business (R.O.P.E.) • Completed site plan and solutions 	<p>Answers:</p>
	<p>Next Steps/Follow-up:</p>

PROPOSE/CLOSE	
Objective: Prepare to close/close the deal.	
Coaching Questions: 1. What has the prospect said to you that indicate he’s ready to negotiate? 2. Has the prospect received a competitive quote? 3. What expectations have you set for the negotiations? 4. Have you prepared a deal jacket? 5. Is the pricing strategy approved? 6. In addition to preparing a no price proposal, have you developed an executive summary? 7. DOS: Have you reviewed the proposal before it goes to the ultimate decision maker?	Answers:
	Next Steps/Follow-up:

Coaching Documentation Handout

The Coaching Documentation Handout will be a half page laminated sheet that supervisors can post in their cube or take with them during a coaching session to ensure they remember all the information that is required for documenting a coaching session. Included are tips for providing feedback and developing an action plan.

Coaching Documentation

Instructions:

1. Create a word document with a record of the coaching conversation, agreed upon action plan and timeline.
2. Ask rep to sign the word document acknowledging the coaching session and action steps.
3. Make copies of word document and coaching form for sales rep.
4. File original copies of documents in the sales rep's file.
Contents should include:
 1. Deal Level Coaching Form
 2. Signed Word document with conversation notes, action plan and timeline.

Feedback Tips:

- Be Specific
- Provide Guidance for how to Improve
- Sandwich Critical Feedback between Positive Feedback

Action Plan Characteristics:

- Specific
- Measurable
- Actionable
- Reasonable
- Time Bound

Participant Feedback Sheet

This form should be populated into SurveyMonkey.com and emailed to participants after completion of the course.

Reaction Survey

Deal Level Coaching for Inside Sales

Instructions: Please provide your reactions to the following questions. We request that you provide open, honest feedback. The results of this survey will be used to help improve the course. All responses are anonymous.

Survey Questions

Rate your level of agreement with the following statements.

	Strongly Disagree				Strongly Agree	
1. This topic is relevant to my job.	1	2	3	4	5	
2. There was adequate time to complete the activities.	1	2	3	4	5	
3. I will use what I learned today on the job.	1	2	3	4	5	
4. This session was the appropriate length.	1	2	3	4	5	
5. This session improved my knowledge of the topic.	1	2	3	4	5	
6. The instructor was knowledgeable about the topic.	1	2	3	4	5	
7. The instructor was an effective facilitator.	1	2	3	4	5	
8. Overall, this was an effective session.	1	2	3	4	5	

Provide your feedback to the following questions.

- 9. What did you like best about the session?
- 10. How should we change or improve this course?