Call Coaching Checklist

Close

Before the call: 6 ways to prepare for call coaching

- ✓ **Be available for reps to ask for assistance when needed:** For example, using the 'Invite' feature in Close's Call Coaching, reps can specifically request a manager to join them on a sales call.
- ✓ **Set your reps up with the right scripts:** Then, you can judge their performance based on the script they used, and also get a feel for the prospect's reaction to the script.
- ✓ **Schedule specific times for call coaching:** To maximize your own time as a manager and reduce stress for your reps, schedule a regular time during the week when your reps will be on calls to coach in real-time.
- ✓ **Give your reps a specific skill to focus on:** When reps know in advance what you'll be listening for on the call, the stress of seeing their sales manager join a call will be reduced.
- ✓ **Set a goal for the call with the rep:** Knowing the goal of the sales calls you monitor will help you assess the skills of the rep.
- ✓ **Get some context on the prospect:** Was this person an inbound or outbound lead? Have they talked with this sales rep previously? Are they currently working with a competitor? Check your CRM for general context on the relationship established, and you'll have a better perspective to coach your rep from.

During the call: 9 details to listen for

- ✓ **The pitch:** How well does the rep follow the structure of the sales pitch script? How well are they able to deliver the script? Are they able to add their own style and personality to the script?
- ✓ **The facts:** Did the rep say things that are incorrect? Did they hide things they thought would cause an obstacle? Did they promise things that aren't necessarily untrue, but very unrealistic?
- ✓ **The prospect engagement:** How engaged are they? When do they lose interest? What's their energy like? Do they seem understood?
- ✓ **The confidence:** How confident are they with the script? Are they in control of the call? How well are they detailing with objections?
- ✓ **The energy:** Is the rep in control of their energy or are they influenced by the prospect? Are they having fun? Can you hear them smile?
- ✓ **The pace:** Is the rep talking too fast, stumbling over their words in a rush to get it all out? Or are they speaking too slowly, perhaps including too many filler words like 'uh' and 'um'?
- ✓ **The connection:** What's the level of rapport? Are the rep and the prospect able to connect in a way that makes both of them like each other?
- ✓ **The questions:** Is the rep asking good questions? Are they getting a full understanding of the prospect's needs, or are they failing to do a bit of extra digging?
- ✓ **The listening skills:** Did the salesperson talk more than they listened? Did they interrupt the prospect? When the prospect provided information that seemed incomplete, did the rep realize it and actively tried to get more answers?

After the call: 5 ways to optimize your feedback

- ✓ **Give time for self-assessment:** Before you provide your feedback, let reps assess for themselves how the call went. Then, you'll see if their idea of the call matches what you heard while on the call.
- ✓ **Start with the positive:** Reps are more likely to listen to and accept any constructive criticism you have after you give them sincere commendation on the points they did well.
- ✓ **Discuss together whether the call accomplished its goal:** Go back to the goal you set with your rep before the call and discuss whether that goal was accomplished.
- ✓ **Collaborate to plan next steps:** Don't leave it at what the rep needs to improve. Instead, help them see the path towards improvement by collaboratively planning next steps.
- ✓ **Keep a clean, structured record of feedback with Custom Activities:** In Close, create a Custom Activity for coaching to give a structured format to your feedback. This saves you time on presenting your feedback and gives reps something they can review and reflect on to see how they've improved over time.