

OBSERVE		ASSESS			COACH		
Sales Stage	Selling Behavior	What to look for			Deliver Coaching		
DISCOVERY	<b>Deliver insight</b>	• Did seller offer a unique, valuable insight that gives the customer perspective?	1	2	3	4	5
		• How well did the seller leverage “storytelling” to engage the customer in the insight?	1	2	3	4	5
	<b>Frame the problem you solve</b>	• Did the seller concisely frame the problem that your product solves?	1	2	3	4	5
	<b>Identify key issues and initial qualification</b>	• Did the seller confirm that the problem your product solves resonates with the customer?	1	2	3	4	5
		• How well did the seller unpack the customer’s issues to confirm they reached the underlying issue?	1	2	3	4	5
	<b>Establish SME level credibility</b>	• Did the seller establish personal SME-level credibility on/around the problem your company solves?	1	2	3	4	5
		• Does the customer perceive the seller to be very knowledgeable and confident about the problem you solve?	1	2	3	4	5
<b>Why now</b>	• How well did the seller establish urgency in solving the problem?	1	2	3	4	5	
<b>Engaging and interesting delivery</b>	• How engaging and interesting was the seller’s delivery?	1	2	3	4	5	
<b>TOTAL SCORE</b>					_____ /45   _____%		

**NOTES**



# CommercialTribe Seller Development Coaching Guide

OBSERVE		ASSESS	COACH				
Sales Stage	Selling Behavior	What to look for	Deliver Coaching				
QUALIFICATION	Diagnose need	• Did the seller restate and confirm the "issue" identified during the discovery call?	1	2	3	4	5
		• Did the seller discuss and confirm the impact that this issue has on the customer's business?	1	2	3	4	5
		• Did the seller discuss and confirm the impact that this issue has on the customer (personally)?	1	2	3	4	5
	Continue to build credibility (personal and for firm)	• How well did the seller use facts/data to build credibility and provide proof of value?	1	2	3	4	5
	Build rapport	• Did the seller have rapport with the customer?	1	2	3	4	5
		• Did the seller come across as authentic and relatable?	1	2	3	4	5
	Effective use of questions	• How well did the seller use fact-finding questions to gather information?	1	2	3	4	5
		• How well did the seller use feeling-finding questions to confirm value?	1	2	3	4	5
		• Were at least 80%+ of the seller's questions open ended?	1	2	3	4	5
	Closing mentality	• Did the seller establish next steps?	1	2	3	4	5
• Did the seller confirm/inquire about the decision maker and decision process?		1	2	3	4	5	
Engaging and interesting delivery	• How engaging and interesting was the seller's delivery?	1	2	3	4	5	
TOTAL SCORE		_____ /60   _____%					

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PROPOSE SOLUTION	Lead with a hypothesis	• Did the seller establish a narrative to recap and confirm the issue identified?	1	2	3	4	5
		• How well did the seller use industry/company knowledge to create a hypothesis of how that issue is presenting both professionally and personally for the customer?	1	2	3	4	5
		• How well did the seller prepare for the call? Did they tailor their message to speak specifically to the customer's issues?	1	2	3	4	5
	Connect the dots between issues and solutions	• Was the seller able to connect the dots between the clients "pain" and how your product/solution resolves that pain?	1	2	3	4	5
		• How clear is the customer's vision for usage of the product? Based on this call can the seller close their eyes and imagine exactly how/when they will use the product/solution?	1	2	3	4	5
	Impactful use of customer stories	• How impactful was the seller's use of customer stories? Did they include facts and quantifiable data to support the story?	1	2	3	4	5
		• Did the seller effectively leverage "storytelling" to deliver the customer story?	1	2	3	4	5
	Probe for, and overcome objections	• How well did the seller handle the objections that he customer presented? Were they overcome?	1	2	3	4	5
		• Did the seller probe to uncover any additional objections lurking below the surface?	1	2	3	4	5
	The cost of inaction/ROI	• Did the seller illustrate the potential cost of inaction?	1	2	3	4	5
• Was the seller able to quantify (time, money, etc.) the cost of inaction or potential for action (ROI)?		1	2	3	4	5	
<b>TOTAL SCORE</b>							_____ /50   _____%

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<b>NEGOTIATE AND CLOSE</b>	<b>Take control – own meeting</b>	• Did the seller set a strong agenda that gave the customer a clear understanding of the expectations for the call/decision?	1	2	3	4	5
		• Did the seller own and steer the buying decision process? (or was the customer dictating)	1	2	3	4	5
	<b>Arm champion to mobilize</b>	• Did the seller arm the champion with the information and support they needed to mobilize the purchase of your product internally?	1	2	3	4	5
	<b>Overcome remaining objections</b>	• Did the seller seek out any additional objections that might arise from the decision maker or economic buyer?	1	2	3	4	5
	<b>Purchasing process</b>	• Did the seller confirm the customer's steps to purchase? Did the seller have crystal clarity into what needs to happen on the customer's side to make this purchase decision?	1	2	3	4	5
		• Were timelines and ownership for next steps clear?	1	2	3	4	5
<b>Closing mentality</b>	• Did the seller present an appropriately aggressive closing mentality?	1	2	3	4	5	
<b>TOTAL SCORE</b>		_____ /35   _____%					
<b>NOTES</b>							