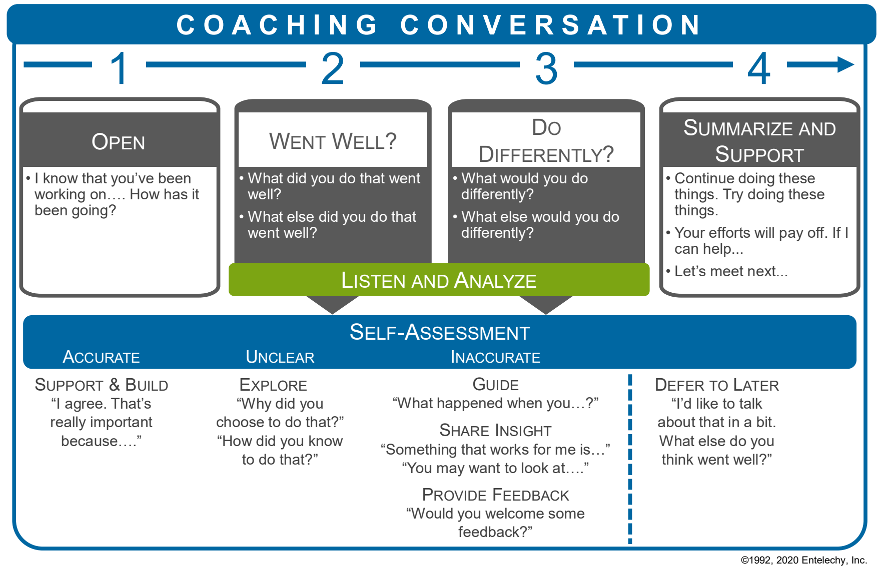
WEST CREEK SALES COACHING

Coaching is used to develop selling skills and can be **transactional** – after a single call or dealer visit – or **strategic** where coaching focuses on a single selling skill. Both coaching scenarios follow exactly the same coaching process (outlined in the Coaching Conversation model on the right).

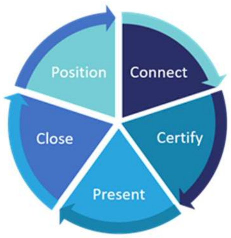


A coaching conversation consists of the coach asking three main questions and inviting the coachee to self-assess. Like a good sales consultant, a good coach knows that the best way to learn and change behavior is through well-placed questions.

Below is a transactional coaching conversation and a strategic coaching session. They both follow Entelechy's Coaching Conversation model:

Step	Transactional	Strategic
1. Open with a performance-focused probe.	Coach: We just had an initial meeting with Bob at Bob's Discount Mattresses. How do you think the meeting went	Coach: You've been working on connecting more effectively with prospects over the past week. How's that been going?
a. Listen for self-assessment.	Coachee: Overall I think it went pretty well?	Coachee: I'm still struggling but am making progress.
2. First Went Well question (to start with the positives).	Coach: Okay, let's talk first about what went well. What do you think you did well in that meeting?	Coach: Okay, let's talk first about what went well. What did you do over the past week that seemed to work in helping connect effectively with prospects?
a. Listen for self-assessment.	Coachee: Well, I was prepared with a clear understanding of the type of business….	Coachee: I think having a quick one-line intro helped me quickly introduce myself and WCF and get the conversation focused on the dealer.
b. Listen and Analyze.	Coach listens for accuracy of the self-assessment.	Coach listens for the general alignment of the self-assessment with what the coach knows to be true.
c. Respond.	Coach (assuming an accurate self-assessment): I agree. You were prepared and not only did that help you connect quickly with the prospect, it gave you confidence.	Coach (assuming an accurate self-assessment): You're right. A scripted introduction helps earn you the right to the meeting and it establishes your future relationship with this dealer as a financing consultant.
2. Second Went Well question (to dig deeper).	Coach: What ELSE did you do that went well? (Notice we are focusing on what the coachee did, not on the result. For example, the dealer may have been friendly; what did the **coachee** do to invite/evoke that friendliness?)	Coach: What ELSE have you done that seems to be helping you connect more effectively with the prospect?
a. Listen for self-assessment.	Coachee: Hmmm…. Well, I think I did a good job of moving the dealer through Fast Path; that went pretty smoothly.	Coachee: Let's see…. I think having references at the ready that I could cite really helped me establish credibility and connect with the dealer quickly.
b. Listen and Analyze.	Coach listens for accuracy of the self-assessment.	Coach listens for the general alignment of the self-assessment with what the coach knows to be true.
c. Respond.	Coach (assuming an accurate self-assessment): I agree. Not only did you provide a quick overview of the process, but by pointing out how easy it was, you	Coach (assuming an accurate self-assessment): Absolutely. Nothing perks up a prospect's ears like an example of a neighboring business. It shows you know what

	gave the dealer a glimpse of what it will be like in working with WCF.	you're talking about AND that WCF offers a viable solution.
3. First Do Differently question.	Coach: Reflecting on the meeting, what might you have done differently to make the meeting go even more smoothly?	Coach: Looking over the past week of calls and focusing on connecting, what might have you done to connect more effectively with prospects?
a. Listen for self-assessment.	Coachee: Man, I jumped right into presenting. And it hurt me by the number of objections the dealer threw at me.	Coachee: I still find it challenging to deal with the initial objections of "I'm good" and "I don't have time."
b. Listen and Analyze.	Coach listens for accuracy of the self-assessment.	Coach listens for the general alignment of the self-assessment with what the coach knows to be true.
c. Respond.	Coach (assuming an accurate self-assessment): I agree; you did jump quickly to presenting rather than asking more investigative questions. Initially it wasn't clear what the high value needs were so your presentation was all over the place. How might you prevent yourself from doing that the next time? (The coach and coachee discuss.)	Coach (assuming an accurate self-assessment): I get it; those can be tough objections and when they come so early it's easy to be caught off guard. How might you overcome those objections in the future? (The coach and coachee discuss.)
3. Second Do Differently question.	Coach: What ELSE might you have done differently to make the meeting go even more effectively?	Coach: Looking over the past week of calls and focusing on connecting, what ELSE might have you done to connect more effectively with prospects?
a. Listen for self-assessment.	Coachee: Hmmm…. I'm not sure I did an effective job in positioning WCF for our upcoming work together.	Coachee: Let's see…. I tend to look at each call as a "must close" situation and, as a result, think I come across rather pushy and sleazy.
b. Listen and Analyze.	Coach listens for accuracy of the self-assessment.	Coach listens for the general alignment of the self-assessment with what the coach knows to be true.
c. Respond.	Coach (assuming an accurate self-assessment): I agree; you seemed pretty eager to get out of there after stepping through Fast Path and that may have left the dealer with some questions. How might you prevent yourself from doing that the next time? (The coach and coachee discuss.) How might you rectify this with THIS dealer now? (The coach and coachee discuss.)	Coach (assuming an accurate self-assessment): That's good insight; you DON'T want to come across that way because it sets up barriers for future attempts to connect with this dealer. How might you prevent this from happening? (The coach and coachee discuss.)
4. Summarize and Support • The two Did Wells • The two Do Differentlys • Support • Next meeting	Coach: Just summarizing … Keep preparing for each call; your prep helps you connect and gives you confidence. And keep your smooth cadence of moving dealers through the Fast Path process. On future meetings, you may want to focus on asking more investigative questions before presenting. And you may want to conclude the meeting by positioning how WCF will continue working with the dealer moving forward. I am sure that if you focus on those two things, your next dealer meeting will go even more effectively than this one. We've got another ride-along tomorrow; how about if we focus on those skills tomorrow?	Coach: To summarize this coaching session…. You'll want to keep leveraging your one-line intro to quickly introduce yourself and WCF and get the conversation focused on the dealer to help connect quickly. And you'll want to have references at the ready to establish credibility. On future calls, you may want to prepare for those initial objections of "I'm good" and "I don't have time" using the techniques we discussed. And you'll want to back off from the one-call-close mentality by establishing a cadence for connecting with each customer. I know that if you focus on those two things, your ability to connect with prospects will improve tremendously. Why don't we discuss how you're doing at our weekly one-on-one next Tuesday?



WCF SALES SKILLS COACHING FORM

Sales managers will use the Sales Skills Coaching Form to capture and summarize a sales consultant's performance to help the sales consultant reflect, accurately self-assess, and develop critical skills.

SALES CONSULTANT **SALES MANAGER** **DATE**

SALES PROCESS ASSESS BEHAVIORS

Pre-Call Planning: Gather Information & Create Plan

- Planned day using system and reports.
- Reviewed dealer notes for opportunities, decision-maker or gatekeeper.
- Set objectives and prioritized goals for the call.
- Prepare for call from dealer's perspective.

CONNECT: Build Trust & Credibility

- Demonstrated authenticity and curiosity about the business and the person.
- Actively listened to the dealer.
- Adapted style to Dealer's communication style and pacing.
- Communicated consistently and balanced verbal (words), vocal (tone), and visual (body).
- Handled early challenges and reached the decision-maker.
- Set verbal agenda and gained agreement to continue.
- Built trust and credibility with decision-maker and gatekeeper.

CERTIFY: Identify Key Issues & Usage Behaviors

- Asked strategic questions to identify the Dealer's Key Issues, Usage Behavior, needs, and decision-making criteria.
- Actively listened to the Dealer and acknowledged what was heard.
- Guided the conversation and maintained focus while flexing with the Dealer's needs.
- Assessed, uncovered, and verbally summarized the Dealer's situation.

PRESENT: Apply Judgment & Offer Solutions

- Summarized understanding of the Dealer's business situation using facts without assumptions.
- Targeted presentation to link WCF advantages to address the Dealer's Key Issues, Usage Behavior, and high value needs.
- Used the Sales Menu to configure a solution to meet Dealer's requirements.
- Described the WCF solution in terms of Dealer and Customer value.
- Differentiated WC from the competition.
- Used WCF sales collateral to effectively present the solution(s) to the Dealer.

CLOSE: Gain Agreement

- Asked for the Dealer's business.
- Heard and answered objections with the Objection Handling Process.
- Pivoted to previous sales process steps – Connect, Certify, Present – as needed.
- Restated and agreed on next steps and goals.

POSITION: Build Long-Term Relationship

- Made commitments to the Dealer and managed their expectations.
- Introduced the Business Review and role in growing the Dealer's business.
- Leveraged insights to identify and uncover future opportunities.
- Established consultant role to gain referrals.

Post-Call Planning

- Documented the time with the Dealer in the system.
- Recorded action items for flawless follow-through.

COACHING

GENERAL OBSERVATION NOTES

WHAT WENT WELL?

1.

2.

WHAT TO DO DIFFERENTLY?

1.

2.

COMMITMENTS

NEXT COACHING SESSION: