



Sales Coaching Bullets & Sales Process

- Assessment
 - DiSC
 - Personal interview
 - Define specific desired outcomes
 - SMART Goals – sales and personal
 - Personal Development Plan
 - Identify KPM's (Key Performance Measures)
 - Written Sales Plan
 - Define Sales System
 - Define ICP (Ideal Client Profile)
 - Lead Generation Sources and Strategy
 - Sales Scripts and Templates
 - VVM – individual and company
 - Time/priority management strategies
 - USP - individual and company
 - Skill Builders/Training
 - Resources
 - Books
 - Web Sites
 - Audio/Visual – POD Casts, other
 - Workshops/Webinars
1. Filter and delegate lead *
 - a. Owner
 - b. Action
 - c. Objective
 - d. Tools and resources
 2. Contact lead
 - a. Owner
 - b. Action
 - c. Objective
 - d. Tools and resources
 3. Needs Analysis
 - a. Owner
 - b. Action
 - c. Objective
 - d. Tools and resources
 4. Presentation/Proposal
 - a. Owner
 - b. Action
 - c. Objective
 - d. Tools and resources
 5. Follow up/through
 - a. Owner
 - b. Action
 - c. Objective
 - d. Tools and resources

Sales Process Development

*Considerations for initial filtering and consequent action

- Values/culture fit
- Wheelhouse
- Payment terms
- Dollar amount/profit margin
- Sales cycle – cash turn around
- Long term and residual potential

*Considerations during sales process

- Framing
- BAM – keeping control
- Referral strategy
- Testimonial timing
- WOW Factor
- CRM
- Systematic touch plan

PEOPLE * PROCESS * PRODUCTIVITY * PROFIT