

Joint Sales Meeting Observation Process Checklist

Briefing, Observation and Debriefing of Salesperson Skills and Knowledge

Pre-Meeting Briefing	Observing the Sales Meeting	Debriefing over Coffee/Tea Not while driving!!
<p>Sales Manager meets salesperson before sales meeting.</p> <ol style="list-style-type: none"> 1. Salesperson to explain his/her pre-meeting prep and discussion plan. 2. Set primary & alternative objectives of sales meeting. 3. Identify stakeholders in the meeting – roles relationships possible needs. 4. Decide whether meeting is a Modeling, Observing or Joint Selling meeting with customer. 5. Confirm selling skills or product knowledge to be observed. 6. Confirm how S/P introduces the Sales manager as observer and is visiting to get more in-depth view of important customers. 	<p>Sales Manager observes sales meeting.</p> <ol style="list-style-type: none"> 1. Salesperson introduces sale manager’s role to customer. 2. Chart the salesperson’s selling skills you both agreed to be observed. Capture specific examples. 3. Take notes of the salesperson’s product knowledge. 4. Support salesperson if necessary. 5. Thank the customer. 	<p>Sales Manager asks the salesperson:</p> <ol style="list-style-type: none"> 1. What selling skills you think you used well? What product knowledge done well? 2. What selling skills or product knowledge do you need to improve? <p>Sales Manager gives Salesperson feedback based on observation:</p> <ol style="list-style-type: none"> 3. State the selling skills and product knowledge S/P used well. Be specific and offer examples. 4. State the selling skills or product knowledge the salesperson needs to improve? Give examples or proof. 5. Discuss and agree on action plan with salesperson for selling skill and or product knowledge improvement. 6. Salesperson agrees on action plan to improve. 7. Offer your support 8. Salesperson sends email documenting improvement action plan and next steps.