

7-Point Checklist for Sales Leaders Riding Shotgun on Sales Calls

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One of the best ways sales leaders can help salespeople improve sales performance is to join them on sales calls. Many sales leaders do a very good job of using sales calls as a coaching tool. They have a structured approach to planning, evaluating, and providing feedback and encouragement. However, I have worked with more who do not have a plan than those who do. This new era of complex sales demands a higher level of performance – and "winging it" will no longer cut it.

As you might imagine, sellers who have a sales leader with a clear strategy for riding shotgun on sales calls often get more out of the experience than sellers who receive ad hoc coaching during ride-alongs. Below is a checklist that both sales leaders and sellers can use to get the most out of sales calls.

An account overview is a great place for sellers to start an interaction with their sales leader prior to going on a sales call. If your company has a history with the buyer, cover a 12-month period when possible. If your company does not have a history with the buyer, sellers can put together a dossier that includes the prospect's business history, opportunity overview, and key information that can be gathered online.

Every sales call should commence with a clear meeting agenda. Prior to the call or meeting, sales reps should outline the agenda and have a sales leader review the agenda via email or a phone call. After it is approved, the sales rep can distribute the agenda to the client and any other stakeholders who will be included in the call.

Prior to a sales call, it is important for a sales rep to consider their goals for the meeting – and identify and define expected outcomes. The history of calls and email contacts with the customer and any special arrangements or circumstances – as well as any issues the customer hopes to resolve during the call – lay the foundation for setting goals for the meeting.

Another important aspect to review prior to the sales call is role assignment. The sales representative or manager should consider not only practical jobs – such as who covers what topic during a sales call – but how each step of the call will be handled. This includes identifying who will be responsible for different types of questions or explanations and when a representative should defer to their superior for an answer.

Typically, most salespeople abhor the idea of rehearsing. However, practice ensures a better performance and should not be skipped. Make rehearsal part of the pre-call preparation for all salespeople. A ride-along is a great time to take advantage of the opportunity to rehearse the sales strategy. Rehearsals create more confident salespeople and provide a space where sellers can learn to address different scenarios.

The meeting or sales call is the final piece of the salesperson's preparation and efforts. If they have been thorough, the meeting should follow a predictable and smooth path. If there are any surprises, it is the responsibility of the sales representative to modify their approach and adapt in the moment. But doing more prep work up front means fewer surprises on the big day.

After the sales call, the final step is for a sales leader and seller to debrief. Consider how the process unfolded and any unexpected questions or scenarios. Discuss what went well during the call and what should be replicated for future calls. Dialog about any areas of weakness the salesperson can strengthen. Have sellers name any lessons or information gained from the experience, as well as talk about the customer follow-up plan.

Sales is exciting work, and the people who are drawn to sales are often high-energy go-getters who want to accomplish their goals. However, passion and determination do not always equal success. Preparation is critical. Sales managers need to understand how their salespeople prepare for calls and meetings so they can do their coaching before the big game. The result is a smarter, more prepared salesperson and a greater likelihood of a successful sale.

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