

Sales-process coaching scorecard

No 7. Pick a score. Back it up with a real example.

SALESPERSON

MANAGER

DATE

Score separately, then compare. Rate the work you have actually seen.

Scores: 1, 2, 3, 4, 5, 6, 8, 9, 10. N/O = not observed. N/A = not applicable.

1-3: needs instruction | 4-6: inconsistent | 8-10: repeatable

A 6: can do it, not reliably. An 8: can do it consistently.

STEP / WHAT GOOD LOOKS LIKE	SELF	MGR
1. Connect Start a useful conversation and put the customer at ease.		
2. Discover Learn their needs, timing and what matters most.		
3. Select Connect the right vehicle to what the customer told you.		
4. Walk around Show the features and value that matter to this buyer.		
5. Demonstrate Use the drive to learn what fits and what still concerns them.		
6. Discuss the trade Understand the trade and explain the next step, if relevant.		
7. Ask for the business Make a clear ask and work through the write-up.		
8. Work through concerns Listen, clarify and bring in the manager when useful.		
9. Hand off and deliver Prepare finance and delivery for a smooth handoff.		
10. Follow through Record what happened in the CRM and own the next step.		

Use your store's steps. Do not total the scores. Pick one behavior to improve.

WORK ON ONE STEP TOGETHER

Step to work on:

What happened in a recent example? Why this score?

Practice it twice. What will the salesperson do next, and how will the manager help?

Review date:

What we will look for: