
The following tool for an **Observation Checklist** is adapted from:

The Sales Manager's Guide to Greatness

Online sales management training

This program provides the training course every sales manager needs to immediately increase effectiveness and drive sales growth. To learn more, visit:

<https://toplineleadership.com/online-sales-management-training-course/>

You can use the links on that page to watch a brief overview
AND watch a **complimentary lesson** on Deal Coaching.

Let's chat!

Use the link [here](https://calendly.com/kevin-101980) (<https://calendly.com/kevin-101980>) to schedule a conversation

Or email me at

Kevin@toplineleadership.com

Make Your Sales Managers
Great Coaches
& Team Leaders
to Achieve
Consistent Sales Growth



TopLine
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Custom Sales & Sales Management Training

Observation Checklist

Name: _____ Manager: _____ Date: _____

Rating Scale: 5-Very Strong 4-Strong 3-Good/Average 2-Needs Improvement 1-High Priority Improvement

Skill/Will Area		Rating	Comments
General skills & wills	Ability to define and achieve Customer Go-Forward Commitment		
	Ability to engage customer		
	Presentation/demo skills		
	Ability to identify and contact multiple decision makers		
	Listening skills		
	Have they made changes based on previous feedback (coachability)		
Ability to move customer through their buying process	Identify customer's current buying step		
	Identify needs / problems		
	Identify / shape customer buying criteria		
	Match customer needs and buying criteria to strengths of your products / services		
	Repackaging weaknesses		
	Resolving customer concerns / objections		
	Ability to negotiate & close		
Preparation (work ethic)	Knowledge of customer / prospect business		
	Knowledge of your products/services		
	Knowledge of competition		
	Overall professionalism & organizational Skills		

Comments / Action Plans: