

## Observation Checklist for Sales Managers

Name:

Manager:

Date:

	Skill/Will Area	Rating	Comments
General sales skills	Ability to define and achieve Customer Go-Forward Commitment		
	Effectiveness of introduction		
	Ability to engage customer		
	Use of presentation materials		
	Ability to identify and contact multiple decision makers		
	Listening skills		
	Managing time during the call		
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	Knowledge of customer / prospect business		
	Knowledge of your products/services		
	Knowledge of competition		
	Overall professionalism & organizational Skills		

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

Comments / Action Plans