

CALL REVIEWS

Sales Coaching Guide

DIAGNOSE

PLAN

FOLLOW-UP

47%

of sales reps hit quota

48% / 80%Coaching perception gap
Reps vs. Leaders**85–90%**of sales training fails to
improve long-term productivity

THE 3-STEP COACHING FRAMEWORK

01 DIAGNOSE

Find the primary reason deals aren't closing — then coach to that.

Analyze conversion rates across your sales process, segments, and products — weighted by volume. Once you've identified the limiting factor, review calls in that area to determine why reps are struggling and which specific skills need work. Pay attention to patterns across reps: is it a team-wide issue or a handful of individuals?

Analyze Conversion Rates

Review rates by stage, segment, and product — weighted by volume. This reveals your real bottleneck.

Review Calls in That Area

Watch several discovery calls for the flagged segment. Write down the goal for each call and whether it was met.

Spot the Skill Gap

If call goals aren't being met, it's a rep skill issue. Note which specific behaviors are missing or weak.

Select 1–3 Skills to Coach

Pick the skills with the biggest gaps. Identify which reps need focused work on each of those areas.

WHY IT MATTERS

- When coaching effort doesn't translate to rep development, the problem is almost always in the diagnosis — most managers jump straight to feedback without identifying the root cause first. Treat sales like a performance sport: record, review, and coach to the data.

BONUS: WHEN REVIEWING CALLS

✓ Call goals consistently met?

Look upstream: investigate post-call follow-up quality or whether segment leads are a good fit. The rep skill is likely not the bottleneck here.

✗ Call goals not being met?

It's a skills issue. Note every specific behavior gap you observe. These observations become the foundation of your coaching plan.

02 PLAN

Set two types of goals — both must be specific and measurable.

Measurable Outcome

1 e.g. close rate: 15% → 40%

Skill Improvement

2 e.g. ask 3 open-ended questions per call

BEFORE CALL

- Review the prospect profile
- Write 3+ open-ended questions
- Set a clear goal for the call

DURING CALL

- Ask your 3 planned questions
- Follow each with "Why?" or "Tell me more"
- Stay in discovery — avoid pitching early

AFTER CALL

- Write your understanding of their needs
- Self-score it: A / B / C
- Send the summary to your manager

03 FOLLOW-UP

Schedule Check-in Huddles

Set up short follow-up sessions after a rep starts the plan. Check whether they're sticking to it and whether you're seeing progress. It's OK to adjust the plan if effort is there but the expected results aren't showing up yet.

Review Calls Proactively

Don't wait for the next scheduled 1:1. Watch rep calls to confirm the agreed behaviors are showing up in practice. If they're not, give direct feedback immediately — consistency is how skills become habits.

3 COMMON COACHING MISTAKES

1 No Time Set Aside

Coaching without dedicated time leads to reactive, one-off feedback that never sticks. Treat coaching like game film review — schedule it, protect it.

2 No Data to Diagnose

Without call recordings and pipeline metrics, you're guessing at the root cause. Ensure every rep call is recorded and reviewed before you coach.

3 No Structure

One-off feedback without goals, a clear plan, and follow-up rarely creates lasting behavior change. Use the Diagnose → Plan → Follow-up loop every time.

THE COACHING LOOP — AT A GLANCE

01 DIAGNOSE

Find the limiting factor. Review calls. Identify the skill gap.

02 PLAN

Set a measurable goal + skill target. Build a structured rep routine.

03 FOLLOW-UP

Run check-in huddles. Review calls. Give feedback before habits form.