

## NRG field visit coaching tool

**Sales person**

---

**Date**

---

**Sales manager**

---

**Today's coaching objectives:**

**1**

---

**2**

---

**3**

---

**Type of call:**

Joint (J)

Training (T)

Coaching (C)

**Scoring code:**

3 – You nailed it

2 - Unremarkable

1 – Let's discuss

Continued on next page

Reminders	Customer Visits	Key Coaching Outcome	Score	Type of Call
1. Call purpose defined	1.			
2. Well prepared				
3. Knew or read social style				
4. Ask questions to identify needs				
5. Build rapport	2.			
6. Actively listened				
7. Relevant reference stories				
8. Benefit statements				
9. Asked for the business	3.			
10. Met call objectives				
11. Delivered ideas of value				
12. Surfaced and dealt with objectives				
13. Expressed positive NRG	4.			
14. Created next action				
15. Asked for referral				

Steve Herzberg is the Managing Director of NRG Solutions. For the past 15 years Steve has worked as a Corporate Trainer and Business Coach, specialising in 3 areas. Sales Training, Presentation Skills and Leadership Training. He takes a refreshing and unique approach to developing people. For more on Steve go to [www.nrgsolutions.com.au](http://www.nrgsolutions.com.au) or call him on 0421864288.