

Self-coaching Checklist

PLAN – Being Well Prepared

- Did I set a specific objective/action step and time frame for the call before it took place?
- Was I prepared with client knowledge?
- Did I accurately anticipate their needs and possible objections?
- Did I have the necessary Industry knowledge? Product knowledge?
- Was I with the appropriate decision maker(s) and/or influencer(s)?
- Did I know which players would be there? (Did I check before the call who would attend?)
- Were my materials appropriate? Professional?
- Did I prepare for rapport? Plan my questions?

PROBE – Uncovering Client Needs:

- Did I question to really understand client needs before product?
- Did I maintain at least a 50/50 talk/listen dialogue? Really?
- Did I drill-down?
- Did I really listen?
- Did I build rapport? Did I connect?

SOLVE – Offering Hartford's Solutions:

- Did I confirm my understanding of my client's needs before offering a solution?
- Did I tailor what I presented to relate to and satisfy the client's needs?
- Was I able to successfully differentiate my products/services?
- Did I uncover objections?
- Did I show empathy and question to learn more before responding to objections?
- Did I check if I satisfied the objections?

COMMIT – Setting a Game Plan for Action:

- Did I summarize the key points and agreed value of my solution before moving to close?
- Did I ask for a specific commitment?
- Do I have any specific take away assignments for myself or team?
- Am I clear about how I will monitor the commitment?
- Did I establish when (and with who) I will follow-up on this call?

OVERALL – Summing it Up:

- What did I do particularly well on this call?
- How did I perform on the key skill in my personal development?
- What area could I improve upon for my next call?
- Overall – How did I do?