

# Sales Coaching Worksheet

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_

Your time and that of your coach are valuable so in order to get the most from your coaching sessions please complete section 1 on your Goals for the session **only** and provide this information to your coach 48 hours in advance of your session so that the coach will be prepared.

What	Details	✓	Notes
<b>1. GOALS</b>			
What are your Goals for the session?	<ul style="list-style-type: none"> <li>Do you have any specific skills you want/need to improve?</li> <li>Do these goals fit with your teams objectives?</li> <li>Do you have the skills but need to be held accountable?</li> <li>How will you know when you have achieved those goals?</li> <li>Why do want coaching now?</li> </ul>		
<b>2. REALITY</b>			
What is the current reality of the situation	<ul style="list-style-type: none"> <li>What is happening now?</li> <li>What is the effect if this continues?</li> <li>What have you done to try and fix this yourself?</li> <li>How do you feel about this?</li> </ul>		
<b>3. OBSTACLES &amp; OPTIONS</b>			
What obstacles are preventing you from reaching your goals and what options do you have open to you?	<ul style="list-style-type: none"> <li>What constraints are on you?</li> <li>What obstacles are in your way?</li> <li>What do you need to stop doing to achieve your goal?</li> <li>What are the disadvantages or advantages of your options?</li> </ul>		
<b>4. WAY &amp; WILL</b>			
What actions do you commit to undertaking to move forward?	<ul style="list-style-type: none"> <li>What will you do now?</li> <li>Is there anything that might stop or hinder you?</li> <li>How will you measure progress and success?</li> <li>How will you keep motivated?</li> </ul>		
<b>5. TAKEAWAYS</b>			
Feedback/Learning	What is your <b>Biggest Takeaway</b> from the session today?		
<b>6. COACHES COMMENTS</b>			
<b>Next Session Agreed</b>	<b>Date</b>	<b>Time</b>	

