The Sales Coaching Session Kit

Turn one real conversation into one behavior your rep can practice

For sales managers, directors, VPs and revenue leaders

A useful coaching session ends with a behavior the rep can try. Choose one customer moment, review the evidence together, and give the rep a short practice loop before the next call.

Coach one moment at a time

Broad feedback such as "go deeper" is hard to act on. Pick an exact moment: a rushed discovery question, an unanswered objection, or a next step that was never confirmed. Describe what happened before suggesting what to change.

Start with the rep's read

Ask the rep what they were trying to learn and what they noticed. Review the customer response together. Use approved recordings when available, or a clear dated note. Stay within your company's recording and data-handling rules.

Name the behavior you want

Choose a specific action: pause after the buyer answers, ask one follow-up about impact, or confirm the next step in the buyer's words. Avoid personality judgments and a long list of fixes.

Practice, then check transfer

Roleplay the same moment for two minutes, switch the buyer response, and repeat. Agree where the rep will try the behavior on a live call. Review that moment next time; completing practice is not proof the skill transferred.

Put conversation context to work

Revenue.io connects captured conversations with Salesforce context so teams can review buyer needs, coach specific moments and follow through on next steps. Use this worksheet with your current process.

See Revenue.io

From "ask better questions" to a repeatable move

Illustrative discovery-call coaching example. The buyer says onboarding takes too long, and the rep moves straight to a feature.

Observation

The buyer described a delay. The rep did not ask who was affected or what the delay changed for the business.

One behavior to practice

After the buyer describes a problem, ask: "What does that delay affect for the team?" Then listen and ask one follow-up based on the answer.

A short practice loop

Manager plays a buyer who says "it is mostly annoying." Rep practices exploring that answer without forcing a financial claim. Repeat with a buyer who names a concrete missed deadline.

A 15-minute coaching agenda

Three minutes for the rep's view, four to inspect the moment, five to rehearse one behavior, and three to agree a live-call application. Keep deal inspection and performance evaluation separate when they would distract from practice.

Questions for your next review

1. Can we describe the moment without judging the rep?
2. Is the new behavior small enough to practice now?
3. What evidence will show the behavior on the next call?

Your working sheet

Use this with one rep and one customer moment. Share the completed sheet only through your approved coaching process.

Rep, call/note link, date and customer moment

What happened? Include the buyer response

One behavior to keep or change

Practice scenario and two buyer responses

Where the rep will try it: call/context and date

Follow-up evidence and review date

Next session: review the behavior in a real conversation, not just whether practice happened.