



SANDLERSM

SALES LEADER GROWTH SERIES

June 10, 2025

Coach to Success

Proven Approach. Effective Conversations. Sales Results.

A little something to think about while we wait to get started...

Poll Question:

If you could wave a magic wand, what's one skill you'd give your team?

Post your answer in the chat box

Reminder: Rename yourselves! First Name, Last Name, Company Name. Ex: Bob Squire, ABC Designs



EMR Sales Pipeline – Stage Criteria/Definition

1. Prospecting – Bonding and Rapport + Up-Front Contract (10% Weight)

Initial outreach to identify potential opportunities. The focus is on establishing trust, building initial rapport, and setting clear expectations using an Up-Front Contract. No solution is presented yet. The goal is to earn the right to a deeper sales conversation by connecting personally and professionally.

2. Qualification – Pain, Budget, and Decision (50% Weight)

This is the most critical stage. The salesperson uncovers the real business pain (e.g., costly downtime, safety concerns, noncompliance), ensures there's a budget or ability to invest in a solution, and identifies how buying decisions are made. The prospect is fully engaged, decision makers are identified, and the salesperson is diagnosing rather than pitching. "No pain, no sale." Credit verification also occurs.

3. Proposal/Quote – Fulfillment (75% Weight)

Once pain, budget, and decision process are confirmed, the salesperson shares a solution aligned with the client's needs. This may include a formal proposal, service scope, and pricing. This is a meeting with the decision maker(s) – and can be in person, virtual, or on a call. It's not a presentation to convince – it's a mutual agreement of what solving the problem will look like. Contract Book (draft ready).

4. Negotiation and Review (90% Weight)

Final alignment before commitment. The client may have questions, clarifications, or concerns. The salesperson negotiates any remaining details (timeline, pricing, service conditions) and ensures all decision-makers are on board. Objections surface here if qualification wasn't strong enough. Contract Book automation (EMR signed and sent for signature and pending).

5. Closed/Won

The deal is fully executed – contract signed through Contract Book (automated). Kickoff or service delivery begins. The opportunity now becomes a customer and transitions to onboarding or service delivery.

6. Lost/Dead

The opportunity is disqualified, withdrawn, or definitively lost (e.g., competitor selected, no decision made, budget pulled). This is a manual entry in HubSpot where the salesperson selects the proper reason in the drop down (very important for future follow up). No active next step is scheduled, and re-engagement would require a new trigger or change in circumstances.

Coaching Questions by Stage

1. Prospecting – Bonding and Rapport + Up-Front Contract (10%)

- How did you establish rapport in this conversation?
- What did you learn about their role or challenges?
- Did you set a clear Up-Front Contract for the next step?
- What signs showed they were willing to engage further?

2. Qualification – Pain, Budget, and Decision (50%)

- What specific business pain did they share? Is it personal and emotional or just surface-level?
- How much is that pain costing them (time, money, risk)?
- Have they agreed it's a high enough priority to fix now?
- What do you know about their budget — is it allocated or discretionary?
- Who is involved in the decision, and what's their process?
- Has the customer ever worked off a PM contract in the past?
- What commitment did they give to moving forward?

3. Proposal/Quote – Fulfillment (75%)

- Did you confirm all three qualifiers (pain, budget, decision) before presenting the proposal?
- Did they agree to make a decision (Ultimate Up Front Contract) when you present the proposal? If not, why not?
- How did you ensure the proposal reflected their actual needs?
- Can we meet their expectations?
- Did you determine any roadblocks (redlines, etc.)?
- What does the prospect believe happens next?

4. Negotiation and Review (90%)

- What questions or objections have come up since the proposal?
- Are all decision-makers aligned, or is someone quiet?
- Is the negotiation about value or price?
- What are you doing to maintain equal business stature here?
- If this deal falls through, where did the process break down?

5. Closed/Won

- What behaviors helped you win this deal?
- How did you build trust and control throughout the process?
- How will you transition this account to delivery or service?
- What do you need from the service team?
- Any special instructions for when techs visit their location?
- Will the refer EMR?
- What type of upsell/growth opportunities exist?
- What's your plan for post-sale follow-up and relationship building?

6. Lost/Dead

- What was the real reason this deal was lost?
- Did you document the reason properly in HubSpot?
- What early warning signs did we miss?
- Did we fully qualify pain, budget, and decision before moving forward?
- What are you doing to stay “top of mind” for the future?
- What would you do differently if you had this one back?

Pipeline Health Checklist

Use this checklist to evaluate the health of each deal in your salesperson's pipeline. Score each factor from 0 to 3 based on how well it meets the criteria below.

Scoring Key:

0 = Not present / unknown

1 = Weakly present or unclear

2 = Adequately present

3 = Strongly confirmed and documented

Health Factor	Score (0-3)	Criteria
Real pain uncovered		Has the rep identified and validated a business pain that motivates change?
Budget known		Has the budget been confirmed verbally or in writing?
Decision process confirmed		Does the rep know who is involved and how the decision will be made?
Deal is in correct stage		Is the opportunity placed appropriately based on where the buyer is in their journey?
Clear next step set		Is there a next step scheduled with a specific date and commitment?
Age of opportunity appropriate		Is the opportunity progressing at a pace that aligns with typical deal cycles?
Confidence in rep's win probability		As a coach, do you believe this opportunity is realistically closable within the expected timeframe?

Total Score: ____ / 21

Guidance:

18-21 = Strong — High confidence in deal quality

13-17 = Needs Coaching — May require intervention to progress

<13 = Likely Unqualified — Consider disqualifying or reevaluating

Co-Creating the Decision Timeline

Who typically drives the decision process, the salesperson or the customer?

Co-creating a decision timeline with the customer means:

- Identifying WHAT the required steps or events are that a buyer needs to experience to make a buying decision.
- Identifying WHEN those events need to take place, working backwards from the date driving the timeline.
- Identifying WHO needs to be involved at each step.

Why should your salespeople co-create a decision timeline with customers? How does this help salespeople?

- It mitigates risk by uncovering the customer's requirements upfront so the salesperson is not surprised by unexpected requirements late in the cycle.
- It helps salespeople qualify or disqualify the buyer, so they can decide whether to commit resources to pursue the opportunity.
- It helps set expectations and align the customer to your buying process.
- It establishes a plan with milestones to keep the sale on track.

Co-Creating the Decision Timeline



Always Look for Patterns

If there are patterns that are out of their control (which there always are), can you bring them up in a “strip lining” way?

Example: *I know everyone here would like to get this deal moving - however I've found that there's typically factors that are outside of your control that would cause this to stall. **What kind of factors should we anticipate?***

Getting Access to Power

- **Get an Up-Front Contract:** “Let me walk you through some of the core principles of our solution. If you don’t fully believe in our solution, we can stop there. If you think it has merit, can we agree we’ll set another meeting and get others involved?”
- **Tell, Don’t Ask:** “In order for us to make sure that our solution precisely meets your needs, I typically speak with [title or role]. How can we make that happen?”
- **Harm’s Way:**
 1. Review Pain
 2. “What are the chances you’ll get asked questions that we have not talked about?”
 3. “Why would you put yourself in harm’s way? Let me take the tough questions.”
- **Irresponsible/Sales Malpractice:** “Knowing how important this summer season is, if I were to knowingly move ahead without understanding the needs of all the stakeholders here – that would be irresponsible (sales malpractice). How do we go about getting others involved?”

Getting Access to Power

- **Fingerprints:** “Your team will have the most buy-in with the solution if they have some say in it. How do we let them get their fingerprints on this?”
- **Use Your Champion:** “Knowing that it’s important for all the stakeholders to have input on this solution, if you were me, how would you go about getting {decision maker} involved in this?”
- **End Around:** Have someone else on the team contact others and toss the ball to them.



"No Decision = No Problem Defined" Trap....

Common stall in sales where:

- The prospect says they're interested...
- But doesn't make a decision...
- And there's no real urgency or consequence for doing nothing.

Happens when:

- The salesperson is working off of surface-level interest or pain indicators ("We're evaluating options, circle back in a month...").
- There's no emotional or financial consequence identified if the problem goes unsolved.
- The timeline is driven by the salesperson's need to close, not the prospect's compelling event or pain.

Slow down and ask:

- *"What happens if nothing changes in the next 90 days?"*
- *"How will this affect your team or revenue if this doesn't get resolved?"*
- *"What's driving your timing to look at this now?"*

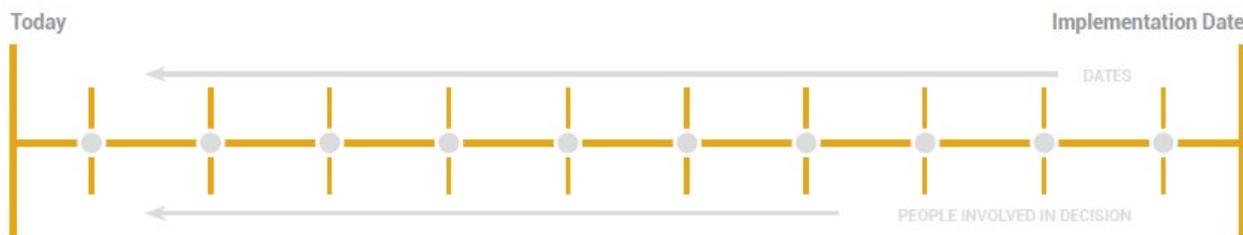
Identify real consequences (PAIN) that the prospect may face:

- Missed revenue targets?
- Frustration at job sites?
- Customer complaints?

Establish mutual clarity: If there's no pain + no timeline = there's no deal!

The Decision Time Line Identifier

Tool 7.3



What are the steps?

Who is involved?

When does it happen?