

The sales debrief.

Turn a sales conversation into a specific coaching exercise. Use this after a call, a field observation, or a role-play.

1 Review what happened.

Use the conversation, not just the result.

2 Name the missing step.

Did the rep learn the problem and connect the presentation to it?

3 Practice it again.

Choose one drill. Listen for one observable change.



Find the actual coaching point.

Worked example: a retail conversation about a service plan. The example is illustrative, not a client result.

WHAT THE REP BROUGHT BACK

They said they wanted something better than what they have. I walked through the features and the price, but they didn't buy.

WHAT YOU NEED TO HEAR

What did they say was wrong with what they have now?

If the rep cannot answer, replay the conversation or mark that detail as unknown. A lost sale alone does not tell you why it was lost.

A SPECIFIC ANSWER CHANGES THE REVIEW

It keeps failing right when I need it most, and nobody picks up when I call about it.

Now review whether the rep asked enough to understand the issue and explained whether the offered service could address it. A list of features is not that explanation.

Choose the drill

- If the rep never clarified the issue, practice the follow-up question.
- If the issue was clear but the pitch ignored it, practice connecting the presentation to the customer's need.

Coach what you observed. Do not invent a motive for the customer or a reason for the lost sale.

Run the next practice.

One rep. One coach. One specific part of the conversation.

Set the scene

The coach plays a customer whose current service fails at the worst moments and who cannot get anyone on the phone. The rep practices discovery before offering a solution.

First pass: understand the problem

Rep: "Walk me through the last time it failed on you. What happened next?"

Listen for a specific answer. Follow up on what the customer actually says. Do not jump into the product list.

Second pass: connect the presentation

Using verified product information, explain what the option can address, what remains uncertain, and any relevant limitations. Then check: "Does that address the issue you described?"

Coach one observable behavior

WHAT THE COACH SAYS

You heard 'something better' and moved into features. Ask what 'better' means for this customer before presenting.

Run that portion again. Check whether the rep now gets a specific need in the customer's words.

Carry it into the next shift

Pick one conversation to review afterward. Record what the rep changed and what still needs work. Bring that observation into the next review.

Build your coaching plan.

Print this page or copy the questions into your notes.

Conversation reviewed

Date, rep, and the call or role-play reference.

Customer's actual words

What problem or desired result did they describe?

Rep's response

How did the rep connect the offer to that need?

Missing or unclear

What do we need to check before drawing a conclusion?

One skill to practice

What exactly should the rep do differently?

Drill and follow-through

What will you rehearse? What will you listen for next time?

Let the notes build the role-play.

Copy the prompt below into ChatGPT or Claude. Replace the bracketed section with your notes.

COACHING PROMPT

Help me prepare a short sales-coaching session from the notes below.

Use only the information I provide. Do not invent customer quotes, product capabilities, motives, or reasons a sale was lost. If the notes are incomplete, identify the missing information.

1. State the customer's problem in their own words when a quote is available. Otherwise label it as a summary or unknown.
2. Explain how the rep connected the presentation to that problem, using evidence from the notes.
3. Identify one observed skill to practice. If there is not enough evidence, give me the question I need to ask before choosing a drill.
4. Create a short role-play for that skill. Include the customer's opening line, what the rep should practice, and what I should listen for.
5. Give me one follow-up question for the next coaching review.

Keep the coaching direct, specific, and useful. Respect a customer's decision to decline. Do not recommend pressure, misleading claims, or guessing at product benefits.

NOTES:

[Paste anonymized notes or transcript here.]

Before using the output

Remove customer names and contact details before sharing notes. Check every quoted statement and product claim. You choose the final coaching plan.