MindTickle

Sales Coaching

How to Use Conversation Intelligence to Navigate the Sales Cycle

Introduction

Today's sales manager faces tremendous pressure to achieve ambitious sales goals, yet **57% of sales reps** are expected to miss their quotas in 2021. Now more than ever, sales leaders need to up their game to increase their teams' productivity and identify areas for improvement. But how can they help their sales reps perform better? How can they understand WHY sales reps fail, WHAT to do about it and WHERE to find the guidance or content to help them improve? In the absence of this, sales managers resort to deal coaching.

More companies rely on **conversation intelligence solutions** to "coach the coach," providing sales managers with the analytics and readiness tools they need to help individual reps overcome their unique challenges. Sales Enablement must be able to access and analyze data from conversation intelligence solutions to identify and prescribe training to fix the specific behaviors that lose deals.

Conversation Intelligence closes the loop on readiness efforts by using insights from real-world buyer interactions to create a personalized skill development program aimed at bridging gaps and maximizing every salesperson's productivity.

In this guide, we outline key components of calls at each stage of the sales cycle. We'll also highlight how an AI-powered conversation intelligence solution can drive effective coaching conversations that improve deal outcomes.

Key Stages of the Sales Cycle

1. Pre-qualification call

In this stage, the sales rep must determine if the contact who raised their hand for a meeting is qualified by asking the right questions and knowing when to probe for more information.

To succeed, reps must:

- Build trust
- Engage in active listening—vs. monopolizing the conversation
- Decide whether to set up a discovery call or send it back to Marketing for further nurturing

1. Pre-qualification call

Here are the required sales activities the rep must take at this stage and related coaching recommendations for the sales manager.

Sales rep call activity	Coaching recommendations
Use information gathered from researching the buyer (social media, company website) so the conversation and questions are relevant to the buyer.	• Analyze the call to see if there were parts of the conversation that were irrelevant to the buyer and could have gone better if the rep had done more research.
At the beginning of the call, clearly explain the purpose of the conversation without launching into an extended sales pitch.	• Review a recording of a model pitch for this stage in the sales cycle with the rep and discuss how it differed from the rep's pitch. • Have the rep practice her pitch and submit a recording for a manager or for peer review. Use AI insights to identify strengths and areas for improvement.
Ask appropriate questions to determine: • Whether the buyer has a need worth solving. Listen for explicit mentions of discovery keywords like "challenge," "need," or "problem" and other pain-related keywords and/or asked questions prompting the buyer to describe pain points • How they solve the challenge today • If your solution is a candidate to solve it, reference relevant use cases	• Share a short learning module on how to pre-qualify a lead and ensure that reps get certified on this training before the next pre-qualification call. • Use AI-based insights to analyze keywords, and then discuss how to listen and respond to these verbal cues. • Provide a training module on different product use cases so that reps can explain different ways existing customers benefit from the solution.

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1. Pre-qualification call

Sales rep call activity	Coaching recommendations
• If the buyer is willing to spend money, with mentions of priority, budget and acuteness of need. • The contact's influence in the buying cycle, with reference to the process and if it includes committees. • Collect the contact information (name, title, level of decision authority) of all the decision-makers.	• Share snippets from other conversations highlighting how to approach different use cases and how existing customers gain value from the solution.
Engage in active listening, letting the buyer describe her situation, and confirming or summarizing what was heard to ensure the buyer that she's being heard. Didn't interrupt.	• Show the rep an analysis of the call, focusing on the ratio of time spent talking by the rep versus the buyer. • Share an active listening course, including the appropriate ratio of listening to talking at this stage, how to paraphrase what was heard in the conversation and ask for confirmation. • After the course is completed, have the rep role-play to demonstrate proficiency in active listening.
Build trust, engage buyers in conversation. Don't launch into a product-focused sales pitch.	• Analyze the buyer's emotion during the call, providing clues about the buyer's receptivity. Discuss how to better build trust and engagement on a pre-qualification call.
Clearly explain next steps and follow up appropriately.	• Review a sales methodology course (provided by your team or by your methodology provider) to ensure pre-qualification calls are documented appropriately and next steps are followed (email follow-up, scheduling a discovery call, etc.).

Based on the information gathered during calls, the rep will either schedule a discovery call or follow up to see if the buyer is ready to move forward.

2. Discovery call

This call is meant to review buyers' needs, criteria for selection, buying process and competitors in play. The rep should:

- Continue to build trust and credibility through thorough preparation
- Reference everything learned in the first call so questions and conversations are not repeated

The discovery call gives the rep the opportunity to dig deeper into how buyers could benefit from the solution. At this stage, it's also important to:

- Get a clear view into the buying process
- Include decision-makers in upcoming conversations
- Be aware of all requirements

2. Discovery call

Sales rep call activity	Coaching recommendations
Ask questions to understand the buyer's challenges and how the solution can help solve it.	• Use intelligence features such as search, keyword identification and timeline analysis to ensure the rep asked the right questions and allowed the buyer to describe challenges in depth.
Understand how the offering would be integrated with the buyer's workflow and existing technologies.	• Share training modules and videos from product managers that explain integration capabilities. Have the rep take training and get certified.
Find out the other solutions the prospect is evaluating and identify what stage of the sales cycle they've reached with each alternative. Discover how the buyer perceives the competition (pros and cons).	• Point the rep to micro-learning training modules on competitors' solutions so the rep can probe for buyer's perception of competitors and set traps as the sales cycle progresses.
Obtain sufficient information on the other decision-makers including top concerns and pain points.	• Have the rep practice how to ask buyers required questions and how to probe for answers.
Listen for opportunities to upsell and cross-sell.	• Share a video with tips on upselling from sales training experts.
Determine if there's a need to bring other team members (i.e., a sales engineer or product manager) to the next call.	• Send the rep a short reinforcement exercise where the rep decides which team member is needed for support in various scenarios.
Clearly explain the next steps and follow up appropriately. Schedule a call with relevant decision-makers and supporting team members.	• Review sales methodology and follow-up sales scripts.

At the end of this call, the rep should have a clear view of what features and benefits to highlight during a demo.

3. Evaluation call

During the evaluation call, the rep demo focuses on the buyer's needs and challenges. The rep provides all the information necessary for the buyer (or buying committee) to make a purchase decision.

Preparation becomes even more critical as the rep moves further along in the sales cycle. Reps should:

- Review notes and recordings of previous calls, and tailor demos to address themes from those conversations
- Brief other team members who will be included in the evaluation call so they can offer support in the right context
- As a result, the rep will become a trusted advisor, increasing their influence on the buying process and reducing negotiation friction later in the sales cycle

3. Evaluation call

Sales rep call activity	Coaching recommendations
Conduct a demo highlighting the solution's benefits, relevant to the challenges the buyer discussed previously.	• Ensure demos and scripts are available for each buyer persona. Have the rep engage in role-play to ensure demos are engaging and relevant. • Review recordings of top-performing demos and point out the key areas of excellence.
Confirm the buyer understands the product and how it can help her.	• Using conversation intelligence, determine buyer's sentiment and questions asked to make sure there's no confusion or frustration during the demo. Discuss how the rep could have improved her understanding of the product and how it aligns with the buyer's needs.
Answer product, service and feature questions accurately. Show knowledge of how the solution compares to the competition. Share industry trends when applicable.	• Provide learning modules to update reps on new product features, competitive positioning, industry trends and news.
Help the prospect visualize how the solution would work to solve their challenges.	• Review a recording of top-performing demos and highlight how the rep painted a picture for each buyer persona of why the offering would positively impact the company.
Successfully address any objections about the product and their impact on solving the organization's challenges.	• Have reps review common objections and effective responses, and then assign a practice exercise to confirm their knowledge.

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3. Evaluation call

Sales rep call activity	Coaching recommendations
Show how the solution is a better fit and better value compared to the other technologies being evaluated.	• Quiz reps periodically on competitive positioning and features so their knowledge is reinforced and up to date.
Gain enough information from the buyer to put together a pricing proposal and/or scope of work.	• Have the rep review best practices for account planning and questions to ask.
Clearly summarize action items and open issues, explain next steps and follow up appropriately. Provide supporting material (product videos, datasheets, testimonials) so the buyer has all relevant information to make a decision.	• Assign a practice exercise to hone best practices for email and follow-up, as well as sales methodology and process.

The rep now has a much better indication of the likelihood of the deal moving forward. This call should have provided all the information needed to put together a proposal to be discussed on the next call.

4. Negotiation call

If the conversations during the previous stages have been productive and successful, the rep should come to an agreement with the buyer, reducing the possibility of surprises. Of all the steps in the sales cycle, the negotiation call demands the most sales expertise.

Reps must master negotiation skills in order to make the most out of every opportunity and close deals.

Sales leaders should review rep performance carefully and provide laser-focused feedback on how to improve negotiation skills.

4. Negotiation call

Sales rep call activity	Coaching recommendations
Deliver a compelling presentation, quantifying the value of the solution in the context of the buyer's needs and situation.	• Review the recording of the call, focusing on the parts where value was discussed and buyer's reactions to the pitch.
Use appropriate upsell techniques to boost order value.	• Share videos of sales pitches that include effective ways to upsell.
Present various options (i.e., length of contract, terms) and product/service bundles that are relevant to the buyer's needs and avoid resorting to discounting.	• Set up a practice call the day before the next negotiation call to review the details of the deal, prospective discounts and potential objections.
Stay confident and maintain a partnership approach to the conversation.	• Have the rep role-play situations where the buyer makes various demands and/or takes an adversarial stance.
Close the call with a summary of what was agreed to, clear next steps and answers to all questions pertaining to moving to contract/purchase.	• Coach the rep on best practices for summarizing at the end of a negotiation call and following up.

At this point, all the elements are in place to build a contract matching the agreements discussed during the negotiation call.

5. Purchase call

During the purchase call, the rep and the buyer review the contract and discuss any pending issues.

To have a successful call, the rep should:

- Guide the conversation carefully and confidently
- Anticipate any last-minute questions from any decision-maker, and come prepared with responses

The goal of the call is for the buyer to be set to sign a contract and start the onboarding process.

5. Purchase call

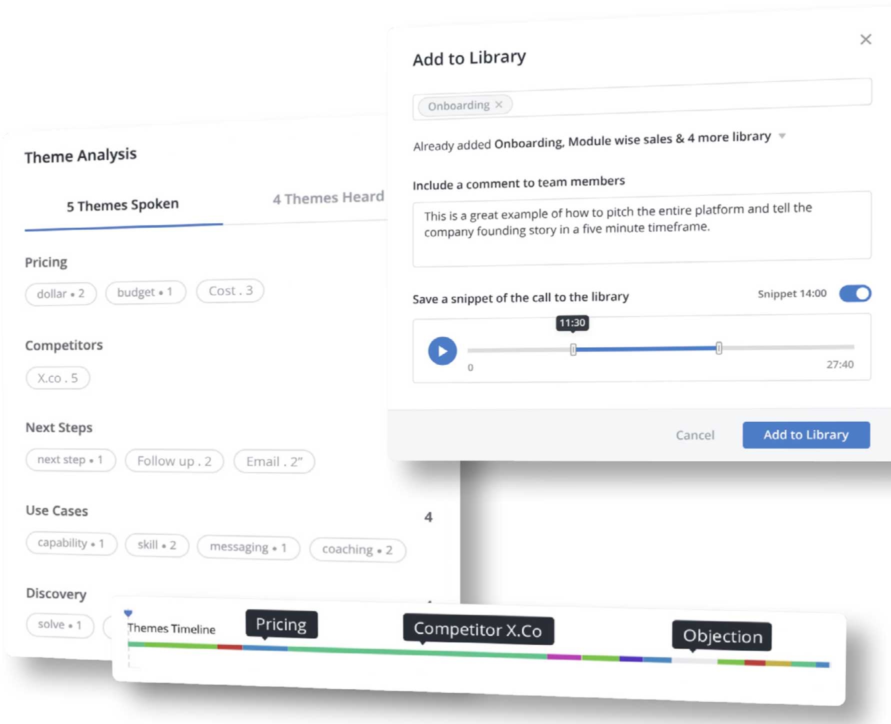
Sales rep call activity	Coaching recommendations
Ask the buyer about the status of the purchase and then actively listen to concerns, questions and obstacles to signing the contract.	• Review the recorded call to ensure the buyer did most of the talking and any concerns were understood and addressed.
Answer last-minute questions to the satisfaction of the buyer.	• During a recorded role-play session, have the rep respond to questions and objections likely to come up at this stage. Have peers evaluate the rep's performance and give tips on how to improve.
Discuss the onboarding and training processes, customer support terms and payment. Establish an implementation start date.	• Assign a quiz measuring knowledge of all contract-related terms and processes.
Summarize discussion, commit to making changes in the contract as agreed to during the call and set expectations for when the buyer would have it signed.	• Show the rep a recorded call of a successful close and follow-up.

And this is just the beginning. Take the lessons learned during this sales cycle to train and coach other sellers. Now more than ever, sales leaders need to up their game to increase their teams' productivity and identify areas for improvement.

Effective sales coaching: the key to navigating sales cycles and closing deals

With conversation intelligence solutions available to find specific skills gaps and recommend remediation, you can easily take a more personalized approach to coaching and help your team win. Reps will be more motivated because they can see where to improve, understand precisely where mistakes were made and take action that will positively affect their next call.

As a sales leader, you will spend less time coaching reps through deals and focus instead on motivating your teams, working on strategic planning and driving revenue growth.



Introducing

Call AI

Conversation Intelligence

With MindTickle, you don't need a separate conversation intelligence solution. Call AI is part of our sales readiness platform, making it the only solution where you can identify and fix the real-world behaviors that stop your salespeople from closing every deal.

It's not enough to know why deals don't close. Instead, identify what holds your salespeople back and then train and coach them to win today's deal—and everyone in the future.

Request a Demo

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