

[Redacted] Call Analysis (Team [Redacted])

Executive Summary & Training Recommendations

Overview

Analyzed **30 calls** across multiple reps and teams against Factor 8's coaching framework. Calls ranged from cold outreach to follow-ups to relationship maintenance.

Team-Wide Strengths (Keep Building)

Skill Area	What I Heard	Rating
Contact Capture	Reps consistently gather updated contact info, navigate to decision-makers, and document well	2.5/5
Value Prop Delivery	Core differentiators (next-day delivery, no minimum, free shipping) are communicated clearly and consistently	2.5/5
Scheduling Next Steps	Most calls end with some form of follow-up commitment; several reps secure specific calendar appointments	2.0/5
Rapport Building	Several reps [Redacted] build genuine connection—customers are engaged and talking	2.5/5

Team-Wide Gaps (Priority Training Areas)

1. SWIFT Introductions — Most Critical Gap

What I heard: Nearly every intro follows the same pattern: "Hi, this is [name] with [Redacted] we're one of your [Redacted] suppliers..."

This is company-focused, not customer-focused. No compelling reason for the prospect to stay on the call. No hook.

Impact: Reps are getting connects but leaving value on the table in the first 15 seconds.

Rating: 1.5 / 5

2. Discovery Depth / Questioning Skills

What I heard: Reps ask questions, but accept first answers without probing deeper. When a customer says "We use [Redacted] first, then [Redacted]" reps say "okay" instead of asking "What's working well? What's frustrating you about that process?"

Very little uncovering of the need behind the need—motivations, values, pain points.

Impact: Reps know *what* customers buy, but not *why* they buy or what would make them switch.

Rating: 1.5 / 5

3. Overcoming Brush-Offs & Objections

What I heard: When customers push back ("*We have global contracts,*" "*I can't send invoices,*" "*We're happy with current vendors*"), reps tend to accept and pivot rather than exploring the objection.

Limited use of "feel, felt, found" or clarifying questions to get to the root.

Impact: Reps are leaving deals on the table when faced with initial resistance.

Rating: 1.5 / 5

4. Getting Deals Moving / Advancing Aggressively

What I heard: Too many calls end with "*I'll send you an email*" or "*Let me know when you're ready.*" When customers hedge on meeting times, reps accommodate rather than push for specificity.

Impact: Pipeline moves slowly; reps lose momentum between touches.

Rating: 2.0 / 5

5. Consultative Selling

What I heard: Most calls feel transactional—"*Here's what we offer, let me know if you need anything*"—rather than consultative. Limited strategic questioning about business goals, upcoming projects, or competitive frustrations.

Impact: Reps are seen as vendors, not trusted advisors. Harder to expand wallet share.

Rating: 1.5 / 5

6. Storytelling

What I heard: Almost zero use of customer success stories. No "*I had a hotel in a similar situation who...*" moments.

Impact: Missed opportunity to build credibility and help customers visualize outcomes.

Rating: 1.0 / 5

2026 Training Roadmap

Based on the gaps identified, here's a phased rollout that prioritizes foundational skills first, then builds toward consultative and closing skills.

Phase	Timing	Focus Area	Sales Bar Courses	ILT Sessions
Phase 1	Q1 2026	Opening Strong + Discovery Foundations	<i>SWIFT Introductions That Work, Question Like a Pro</i>	2 virtual ILT sessions (Intro workshop + Discovery workshop)
Phase 2	Q2 2026	Handling Resistance + Advancing	<i>Overcoming the Brush-Off, Getting Deals Moving</i>	2 virtual ILT sessions with call practice
Phase 3	Q3 2026	Consultative Selling + Differentiation	<i>What Customers Care About, Selling With Stories</i>	1-2 ILT sessions focused on value-based selling
Phase 4	Q4 2026	Closing & Reinforcement	<i>Closing Confidently, Expert & Empathetic Listening</i>	1 ILT capstone session + coaching reinforcement

Quick Wins (Immediate Impact)

If you need something to deploy before the full rollout:

1. **SWIFT Intro Blitz** — Single ILT session in January with the SWIFT Intro Samples Guide. Have reps rewrite their intros and practice live. This is the fastest needle-mover.
2. **"One More Question" Challenge** — Challenge reps to ask at least one follow-up question after every customer answer for two weeks. Track talk time as a proxy for success.

Recommended Success Metrics

Track these monthly to measure training impact:

- **Talk time per call** (target: increase average by 20%)
- **Calls over 5 minutes** (shows real conversations happening)
- **First orders from new/dormant accounts**
- **Appointments set per week**
- **Competitive displacement wins** (HD/Guest Supply switches)

Expected Business Impact

Here's how the training directly connects to [redacted] priorities:

Skill Gap	Business Impact When Fixed
SWIIFT Intros	More conversations go past 30 seconds → More discovery opportunities → More pipeline generated per dial
Discovery Depth	Reps understand <i>why</i> customers buy, not just <i>what</i> → More relevant recommendations → Larger first orders, faster competitive displacement
Objection Handling	Fewer lost opportunities when customers say "we're happy with [redacted]" → More competitive wins
Getting Deals Moving	Faster sales cycles → More orders per rep per month → Revenue acceleration
Consultative Selling	Reps become trusted advisors, not vendors → Wallet share expansion, repeat orders, referrals to sister properties
Storytelling	Differentiation in a commodity market → Easier competitive displacement

What I typically see with teams like this:

When you fix the intro + discovery foundation (Phase 1), you usually see talk time increase 20-30% within 60 days. That's a leading indicator—longer conversations mean real discovery is happening.

When you layer in objection handling and advancing skills (Phase 2), conversion rates from connect to appointment typically improve. For a team selling into an existing relationship like [redacted] has with [redacted] properties, that can translate to faster first orders and more competitive switches.

The consultative and storytelling skills (Phases 3-4) are where wallet share expansion really kicks in. Customers start seeing reps as partners, not order-takers.

Executive Summary (One-Pager)

[redacted]: Sales Team Assessment & Training Recommendation

Prepared by: Factor 8

Date: January 2026

The Opportunity

[redacted] has a significant competitive advantage: preferred [redacted] supplier status, next-day delivery, no minimums, and strong pricing. The sales team understands the value prop—but the calls reveal they're leaving money on the table in *how* they sell, not *what* they sell.

What's Working

- Reps capture contacts and navigate to decision-makers effectively
- Core value props (delivery, pricing, no minimums) are communicated consistently
- Many reps secure follow-up commitments
- Several reps build genuine rapport

What's Holding Them Back

Gap	Impact
Generic, company-focused intros	Prospects tune out in first 15 seconds
Surface-level discovery	Reps know <i>what</i> customers buy, not <i>why</i> —limits ability to displace competitors
Accepting objections too easily	Lost opportunities when customers push back
Weak advancement	"I'll send an email" instead of specific next steps—slow pipeline
Transactional vs. consultative	Reps seen as vendors, not partners—limits wallet share growth

Recommended Training Plan: 2026

Quarter	Focus	Courses
Q1	Opening Strong + Discovery	<i>SWIFT Introductions, Question Like a Pro</i>
Q2	Handling Resistance + Advancing	<i>Overcoming the Brush-Off, Getting Deals Moving</i>
Q3	Consultative Selling	<i>What Customers Care About, Selling With Stories</i>
Q4	Closing & Reinforcement	<i>Closing Confidently, Expert & Empathetic Listening</i>

Delivery: Virtual ILT sessions + Sales Bar self-paced coursework + manager coaching reinforcement

Expected Outcomes

- Increased talk time and quality conversations
- Faster first orders from new/dormant accounts

- More competitive wins vs. [redacted] and [redacted]
 - Expanded wallet share with existing buyers
 - Shorter sales cycles
-

Immediate Quick Win

Launch a **SWIFT Intro Blitz** in January—single session where reps rewrite and practice customer-focused openings. Fastest path to measurable improvement.