

For use by Sales Leaders to evaluate individual sellers operating in a *virtual* environment.

High or average performers may not retain their historical performance status under virtual selling conditions. Some may move up or down the performance curve.

Consider these questions for each seller. Determine remediation by individual. Post-assessment, build an individual skills upgrade / coaching plan. Consider team training where more efficient.

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1. Is the seller an historically high performer who is experiencing a change in ability to achieve success? What about their behavior is different, or what skill set is lacking? What coaching or training do they need?
  2. Is the seller an historically average performer whose performance is improving? Is the improvement related to virtual capabilities? How can these be replicated for other team members?
  3. Rate the seller's virtual selling capability (*high, medium, low*) in the following areas. Note what skills upgrades or coaching is required. Make an individual plan:
    - ✓ Virtual prospecting
    - ✓ Virtual meeting preparation (*participants, logistics, objectives, follow-up*)
    - ✓ Virtual customer presentations or demos
    - ✓ Video meeting presence (*appearance, visible workspace, backgrounds/green screens, participation, meeting management*)
    - ✓ Technical proficiency with collaboration tools (*Zoom, Teams, etc.*)
    - ✓ Virtual relationship management (*ability to maintain meaningful, value-added connections with customers using a variety of connection methods*)
    - ✓ Time management / effectiveness in home office environment
  4. Does the seller require a different communications cadence with you than in the past? (*More frequent 1:1 check-ins, video vs. regular calls, an off-hour schedule due to home responsibilities*). What adjustments should you make?
  5. Has the seller changed their working pattern or hours to accommodate home responsibilities? Can the business accommodate their needs? What additional support do they require?
  6. Can the seller manage their current workload / number of accounts effectively? Are they falling behind or showing signs of stress? What adjustments do you need to make?