

VIRTUAL REALITY CHECK

CHECKLIST

Ask yourself these 20 questions to determine if your reps have the skills to sell virtually. Add up your points at the end to identify where your reps are crushing it, and where they need help. Unless otherwise indicated, **YES = 1 POINT** and **NO = 0 POINTS**.

FOUNDATIONS

- On a scale of 1-5, how confident is your team in using video tools?
 1 2 3 4 5
- Have you presented and/or participated in the following online conference software? (1 point each)

<input type="checkbox"/> Zoom	<input type="checkbox"/> Google Meet
<input type="checkbox"/> Microsoft Teams	<input type="checkbox"/> Skype
- Have you ever led a video call? If yes, which tools have you utilized? (1 point each)

<input type="checkbox"/> Breakout rooms	<input type="checkbox"/> Poll
<input type="checkbox"/> Chat	<input type="checkbox"/> Screen share
<input type="checkbox"/> Annotate	
- Has your team utilized out-of-the-box virtual tools, like Soapbox, to share messages and engage with prospects?
 YES NO

FOUNDATIONS TOTAL: _____

INVESTIGATE

- Has your team/organization hosted at least one webinar in the last 3 months?
 YES NO
- Does your team use relevant social media, such as LinkedIn, for positioning and prospecting? Bonus point if you closed a deal that you found via social!
 YES NO
- Which of the following tools does your team use to prepare/pre-call plan for a meeting? (1 point each)

<input type="checkbox"/> LinkedIn	<input type="checkbox"/> Google search
<input type="checkbox"/> Company website	<input type="checkbox"/> D&B Hoovers
<input type="checkbox"/> Facebook	<input type="checkbox"/> Zoom Info

INVESTIGATE TOTAL: _____



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MEET

8. Do your reps log into their video meetings early to do a technology check (internet connection, proper lighting, disabled notifications, relevant slides/documents pulled-up and ready, etc.)?

YES NO

9. When meeting with a client or prospect, do reps consistently use video calls (versus the phone)? (2 points if they keep the camera ON)

YES NO

10. Are your reps able to effectively recognize and adapt to prospect personality styles virtually (based on tone of voice/pace/volume, body language, and email)?

YES NO

MEET TOTAL: _____

PROBE

11. During virtual sales calls, do your reps let the prospect do 50% or more of the talking (versus you rep doing most of the talking)?

YES NO

12. Does your team use the “three deep” questioning strategy to uncover the prospects true wants and needs?

YES NO

13. Do your reps use a summary statement at the end of their virtual calls to ensure they understand their need?

YES NO

PROBE TOTAL: _____

APPLY

14. Has everyone on your team delivered a targeted solution to a prospect or client virtually?

YES NO

15. Have your reps presented with PowerPoint on a video call?

YES NO

APPLY TOTAL: _____

CONVINCE

16. Does your team feel comfortable negotiating/managing objections virtually?

YES NO

17. When presented with an objection, do your reps resist the urge to fill the virtual silence and instead following with a question?

YES NO

18. Do you allow prospects to experience your product, solution, or service virtually (demo, marketing materials, free trial, etc.)?

YES NO

CONVINCE TOTAL: _____

TIE-IT-UP

19. Are your reps able to virtually earn a prospect's trust and the right to ask for business?

YES NO

20. Has your team ever closed a deal virtually?

YES NO

TIE-IT-UP TOTAL: _____

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GRAND TOTAL: _____

THE GRADING SCALE:

- **35 + points** indicate your sales team knows what they are doing when it comes to selling virtually. Keep it up!
- **21 - 34 points** indicate your team knows their way around a video call but are not necessarily comfortable. Your reps could use some pointers to become top virtual salespeople.
- **20 or fewer points** indicate your sales team needs to be virtually upskilled if you are going to beat the competition in 2021.

What are the top three skill areas you'd like your team to develop further to be fully confident in your ability to use video calls?

1. _____
2. _____
3. _____

GET THE SKILLS

