



Using e²m

Using e²m is easy – these pages show you how

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Using e²m

Overview

Using the e²m service

Once registered, it is easy to set up your team Dashboard. This is a simple process of adding the details of your sales team members and then the types of meetings that will be the most appropriate 'model' for them. Don't worry about this too much at the beginning. You can add (or remove) people and meeting types whenever you wish. You can start with just one person and the first type of meeting.

Choosing meeting types for your dashboard

Different types of meeting have different objectives. Each has its own approach depending on whether it's on the phone or face to face and where the customer or prospect is in the sales cycle. Full details of the different call types are on the Add/remove meeting type page. Read through these carefully to make sure you choose the most relevant type.

What do I have to do before observing a call?

Discuss the process with your team (why you are doing this, benefits to them, what will happen afterwards). Choose the meeting type and download the appropriate scoring sheet and make sure you are familiar with what you are looking for.

At the meeting

You need not take part in the client meeting; you are there to observe your team member's performance. You will explain to the client at the beginning that you are simply there to observe. You should resist the urge to 'help' the salesperson during the meeting. Firstly because it will undermine their authority and secondly because it would make the observation invalid. Try to be as unobtrusive as possible, making notes, scoring as you go along if you wish. Note some good points as well as areas for development.

After the meeting

It is a good idea to have a detailed discussion about the way the meeting went immediately after the call - immediate feedback is always the best. Then you can schedule some time with the salesperson to review your report and agree actions when you are back in the office. As soon as you can, enter the results of the observation into the e²m system, look at the results and decide how you can coach the individual at your next one-to-one.

Developing the salesperson

1. Look through our Sales Manager as a Coach resource. This is a great set of tools and techniques to help you to improve the quality of your coaching.
2. Review areas for development and decide on which area you are going to focus. Focus on one area at a time. Look at our other coaching resources for relevant material.
3. Review objectives set at previous meetings to ensure progress.
4. Discuss development action and agree at least one objective and enter the details of that objective onto the system.
5. Fix a date in your diaries for the next assessment and/or 1:1 to review progress. We recommend that you observe at least one call a month with each of your team.
6. Ensure you reward progress with positive feedback to the individual and share best practice amongst the team.



Using e²m

<p>Setting up the Dashboard</p> <p>Once registered, enter details of your salespeople by clicking on the Add Team Member button</p> <p>Then add at least one 'meeting type' that best reflects the sort of meetings that your salesperson has.</p>	
<p>Add team member</p> <p>Enter all details – these can be changed at any time.</p>	
<p>About meeting types</p>	<p>Customer meetings often have differing objectives and therefore require their own approach. Face to face and phone meeting templates are available on e²m for each of the three meeting types offered. Add or remove relevant meeting types from your dashboard at any time.</p>
<p>The Uncovering Need meeting</p>	<p>Getting a better understanding of the customer's needs. This template is to be used for evaluating a meeting where the objective is to gain a better understanding of the customer's business needs at an early stage in a sales cycle. In addition to establishing a good understanding of the needs of the customer, the salesperson is also assessed on positioning your company and its products and, importantly gaining permission to go back to the customer with a plan, proposal or recommendations.</p>
<p>The New Offer meeting</p>	<p>To promote a new product, offer or promotion. This template is to be used for evaluating a sales call where the objective is to promote a new product, offer or promotion. It assumes that after this call, there will be a further stage of background work to produce a proposal of some kind and that a further call or meeting will be required to close the sale.</p>
<p>The Closing meeting</p>	<p>This is specifically to close a sale at the end of a sales cycle. This template is to be used for evaluating a meeting where the objective is to close a sale. This will be appropriate at the end of a sales cycle where some previous activity with the customer has taken place and there is some form of proposal on the table.</p>



Using e²m

Add/remove meeting types

Click to add or remove

Meeting types added will appear on your Dashboard

Different meeting types have different objectives and require a different approach. This is also true if the call is face-to-face or on the phone. You can add or remove meeting types from your dashboard at any time.

	Meeting Type	Description	Add /Remove
Face to Face	Uncovering need	Getting a better understanding of business need (More...)	<input type="checkbox"/>
	New offer	To promote a new product, offer or promotion (More...)	<input type="checkbox"/>
	Closing sale	To close a sale at the end of a sales cycle (More...)	<input type="checkbox"/>
Phone	Uncovering need	Getting a better understanding of business need (More...)	<input type="checkbox"/>
	New offer	To promote a new product, offer or promotion (More...)	<input type="checkbox"/>
	Closing sale	To close a sale at the end of a sales cycle (More...)	<input type="checkbox"/>

Using the Dashboard

Your Dashboard shows the status of your team, your team members and the range of meetings that the team has with their customers. The most recent meeting assessment is shown using Red, Amber or Green to reflect the meeting score.

For example, the latest assessment for this person was on 12/03/2009 and the overall result of the assessment was 'review' (Red)

This assessment was on 04/03/2009 and the overall result was 'Good' (Green)

No assessments for meetings of this type have been done for this person

Clicking on a cell shows the individual's assessment scores, enables you to add new scores, manage a sales person's objectives or review performance trend reports.

Dashboard

For a quick overview of the service before using it, please look at [Using e2m](#)

Add an assessment:
Within the table below, click on a + link within the relevant meeting type to add an assessment.

View/edit an existing assessment:
An existing assessment will feature a highlighted date. To view or edit an existing assessment, click on the highlighted date.

Team member (click to edit)	Uncovering Need (Face to Face Meeting)	New Offer Meeting (Face to Face)	Closing Meeting (Face to face)	Uncovering Need (Telephone Meeting)	New Offer Meeting (Telephone)	Closing Meeting (Telephone)
Clare_Mayell	22/01/2009	+	12/03/2009	+	+	28/02/2009
David_Livingstone	+	18/02/2009	23/02/2009	+	+	+
ff_vv	+	28/02/2009	+	+	+	+
John_Terry	+	+	+	+	+	+
Test_final	04/03/2009	04/03/2009	04/03/2009	04/03/2009	04/03/2009	04/03/2009
Suresh_Sampath	+	+	+	+	+	+

KEY
GOOD
DEVELOP
REVIEW



Using e²m

Edit Team Member details

Clicking on the team member's name will open a window which will enable you to edit their personal details

Team member (click to edit)	Unc (Fac Mee)
Clare Mayell	
David Livingstone	
Mark Savinson	
Fred Nelson	
Gary Greene	

E-mail Address *	testfinal@test.com
First name *	Gary
Last name *	Greene
Phone Number *	044-23453545

Submit

Add an Assessment

Click on any cell to add an assessment for the individual and for the appropriate meeting type.

Team member (click to edit)	Uncovering Need (Face to Face Meeting)	New Offer Meeting (Face to Face)	Closing Meeting (Face to face)
Clare Mayell	+	+	12/03/2009
David Livingstone	+	18/02/2009	23/02/2009
Mark Savinson	+	26/02/2009	+
Fred Nelson	+	+	+

The next screen allows you to Edit or view a previous assessment or, as in this case, add a new one.

Add, Edit or View an Assessment

Add new assessment	Manage Objectives	Individual trend report
Team member: David Livingstone		Assessment type: New Offer Meeting (Face to Face)
Assessment date	Client/Date	Status
18/02/2009	test123	
13/01/2009	ISMM/13th Jan	

Each type of an assessment comes with a comprehensive guide that shows you how to score and analyse performance. Click to download the guide and then print. You can also download and print a version of this scoresheet.

Client: test

Welcome Test User Back

- Click here to download and print guidance to assess this type of call, you can also download a printable version of the scoring document to use in the call
- Read notes and score the meeting call
- Come Back here to enter the results

Add an assessment

Assessment type: New Offer Meeting (Face to Face)	Team Member: David Livingstone	Client/Date:	Assessment Date: 06/04/2009
---	--------------------------------	--------------	-----------------------------

Opening Position	Weak					Good				
	1	2	3	4	5	1	2	3	4	5
Made a positive initial impact	●	○	○	○	○	○	○	○	○	○
Clearly articulated reason for meeting and confirmed that the customer was comfortable with that	●	○	○	○	○	○	○	○	○	○
Represented your company as a partner that can help in relevant areas of their business	●	○	○	○	○	○	○	○	○	○
Gained permission to go back with results of follow-up	●	○	○	○	○	○	○	○	○	○



Using e²m

Scoring the meeting

There is a scoring sheet for each of the types of call. Ensure you use the appropriate scoring sheet.

Initially, you will find it helpful to print out the sheets in advance to use at the meeting.

You can use the sheets when you observe the call or meeting, marking each of the sections as you progress. Alternatively, you can make notes during the meeting or call and complete the sheet afterwards.

For each of the individual areas, look carefully at the examples or questions. Then mark each section according to the following guidelines:-

Opening Position

The sales person should be "in control" of the meeting from the outset. The first minute of a meeting usually sets the tone for the whole meeting. The sales person should be engaging, show the appropriate level of formality and make it clear that the meeting has a purpose and that it will be of value to the attendees.

Made positive initial impact

- Positive body language
- Outlined agenda
- Clearly in "control" of the meeting

1	2	3	4	5

Clearly articulated reason for meeting

- Did they explain why they were there?
- Did they position it as valuable to the customer?
- Did they get agreement to the purpose of the meeting and that it would benefit the customer?
- Did you feel there was a shared agenda?

1	2	3	4	5

Represented your company as a partner that can help in relevant areas of their business

- Did they position your company's full range of capabilities?
- Did they positively position your company as a partner rather than a supplier?
- Did they confirm that the customer saw any value in this?

1	2	3	4	5

Score Definitions

- ① They did not attempt this at all. They completely failed.
- ② They made very limited effort to make the step, perhaps after prompting.
- ③ They did do what was required, but only just. There was no spark.
- ④ They did what was required to a good standard - you observed a strong level of engagement between the sales person & the customer
- ⑤ They excelled at doing this – they did everything they could and you felt that they were truly engaged.

Transferring to system

As soon as possible, transfer the 'scores' to the website.

Enter the client name and date in the box and then click to enter the appropriate scores

Make use of the comments section at the bottom of the webpage

Add an assessment

Assessment Type: Uncovering Need (Face to Face Meeting)	Team Member: Clare Mayell	Client/Date:	Assessment Date: 06/04/2009
Opening Position			
Made a positive initial impact			Weak 1 2 3 4 5 Good
Clearly articulated reason for meeting and confirmed that the customer was comfortable with that			
Represented your company as a partner that can help in relevant areas of their business			
Gained permission to go back with results of follow-up			
Showed empathy and sensitivity			



Using e²m

Edit an Assessment

Add, Edit or View an Assessment

Add new assessment	Manage Objectives	Individual trend report		
Team member : Test final		Assessment type : Uncovering Need (Telephone Meeting)		
Assessment date	Client/Date	Status	Edit	View
04/03/2009	testq	 		

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You can edit scores and comments, then submit the revised page

Summary & Closing	Weak to Good				
	1	2	3	4	5
Summarised key points & provided a strong benefit statement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identified whether there was any other information that the customer needed before making a decision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Identified and resolved any reservations the customer might have before agreeing to an order	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Asks for the order/agrees time when order will be received	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manager comments					
<input type="text"/>					
<input type="button" value="Submit"/> <input type="button" value="Print"/>					

View an Assessment

This page shows the detail of the assessment with an overall performance rating.

Look at our Coaching Resources. These provide a great set of tools and techniques to help you to improve the quality of your coaching.

Review areas for development and decide on which area you are going to focus. Focus on one area at a time. Look at our other coaching resources for relevant material.

Review objectives set at previous meetings to ensure progress.

Discuss development action and agree at least one objective and enter the details of that objective onto the system.

Fix a date in your diaries for the next assessment and/or 1:1 to review progress. We recommend that you observe at least one call a month with each of your team.

Ensure you reward progress with positive feedback to the individual and share best practice amongst the team.

Welcome Test User

View an Assessment

Assessment Type: Uncovering Need (Telephone Meeting)	Team Member: Test final	Client/Date: testq	Assessment Date: 04/03/2009
Back View Objectives			
Overall Performance			
<p>This page gives you a view of overall performance. Set aside some dedicated time to discuss the performance and:-</p> <ol style="list-style-type: none"> Identify areas for development (red or amber markings) Discuss different approaches - look at Coaching & Resources section Set and monitor objectives that will help improve ratings 			
Section: Opening Position		Assessed against the following criteria	
		<ul style="list-style-type: none"> Ensured that call recipient was in a position to deal with the call and that time was available Made a positive initial impact Clearly articulated reason for call and confirmed that the customer was comfortable with that Represented your company as a partner that can help in relevant areas of their business Gained permission to go back with results of follow-up Showed empathy and sensitivity 	
Section: Understanding Customer's Issues		Assessed against the following criteria	
		<ul style="list-style-type: none"> Managed the discussion on relevant business areas Uncovered the main business issues facing the customer through good questioning and listening Used industry knowledge, references and case studies where possible to build credibility Identified budgetary constraints Validated and prioritised relevant customer business challenges 	
Section: Projects and Opportunities		Assessed against the following criteria	



Using e²m

Manage Objectives

Review previous objectives

Mark those that have been completed

Document the objective that was agreed at the review meeting

Manage Objectives Add Objectives

Objectives list for Clare Mayell

Uncompleted Objectives					
Date Objective set	Competency Type	Description of objective	How to measure objective	Target date	COMPLETED
04/03/2009	Uncovering Need (Face to Face Meeting)	try to get things right first time	measurement	18/03/2009	<input checked="" type="checkbox"/>
23/03/2009	Uncovering Need (Face to Face Meeting)	Do research on company before making call and use information in the meetings	Prepare meeting plan for next review showing links between what we know about the client and our offerings	31/03/2009	<input type="checkbox"/>

[Confirm](#)

Completed Objectives					
Date Objective set	Competency Type	Description of objective	How to measure objective	Date Completed	
02/03/2009	Uncovering Need (Face to Face Meeting)	Need to have a clear call plan before every call	I will ask to see documented evidence of a call plan at the start of each call out session	06/03/2009	
26/02/2009	Uncovering Need (Face to Face Meeting)	sdfasd	asdfsaf	27/02/2009	
26/02/2009	Uncovering Need (Face to Face Meeting)	gasdf	hsadsf	27/02/2009	

Add Objectives

Relevant objectives should be set at every review meeting

Objectives need to be measurable and timebound. For example “by 30th September update all opportunities in my pipeline to show %age chance of winning”

Client: test

Welcome Test User

Objective description *
Do research on company before making call and use information in the meetings

Objective measure *
Prepare meeting plan for next review showing links between what we know about the client and our offerings

Target date *
31/03/2009

[Submit](#)

* Mandatory fields: indicates that an answer is required. All details will be treated in the strictest confidence.

Copyri

Coaching & Resources

Accredit has developed a range of powerful but simple-to-use resources that all sales people and managers can use to help make them more successful. These are based on our extensive work developing sales effectiveness in large and small organisations. They can be used at any time but can be most effective in a coaching environment, after using e²m to reviewing a meeting.

They are available as flash presentations, with a commentary or as static pdf presentation

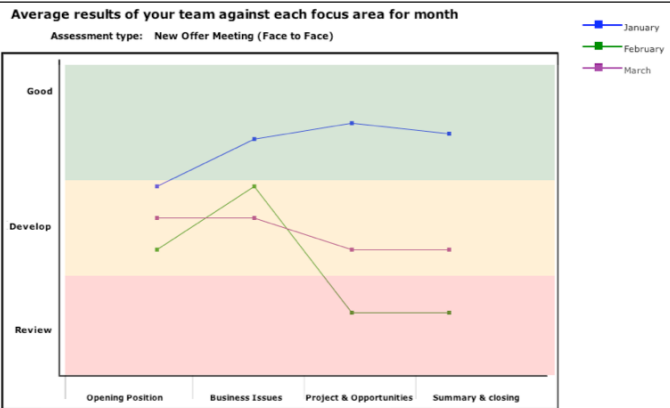
Team Reports



Using e²m

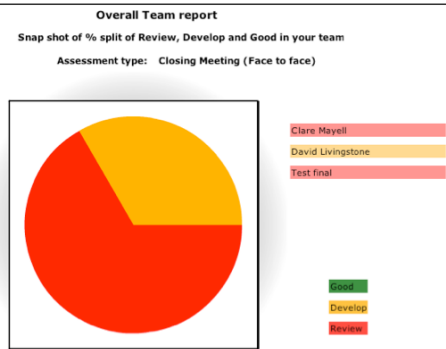
Trend Report

The Trend report shows how the performance of the team has been changing over time. In this example, the team's performance in January was good across each of the 4 areas, dropped significantly during February and recovered slightly, as far as Projects and Opportunities and Closing were concerned, in March.



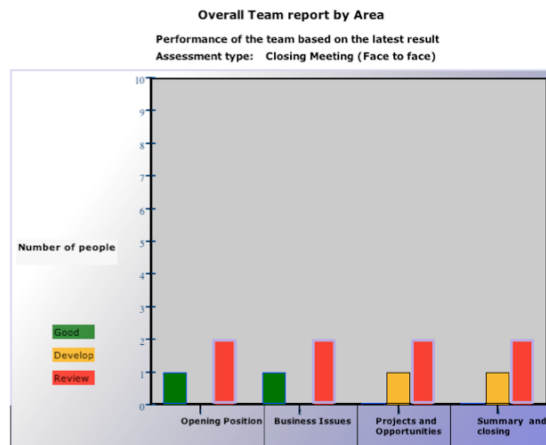
Overall Team Report

This report shows that, in terms of the overall performance, 33% of the team are in 'Review' status (Red) and 66% are in 'Develop' (Amber). Their names are shown.



Team Report by Area

This chart looks at the four specific performance areas (Opening Position, Business Issues, Projects & Opportunities, Closing). It shows how many people in the team are in each of the 'red', 'amber', 'green' status positions



Individual Trend report

This is accessed through the 'Add, Edit or View a report page

Add, Edit or View an Assessment

Navigation: Add new assessment | Manage Objectives | Individual trend report

Assessment type: Uncovering Need (Telephone Meeting)

Assessment date	Client/Date	Status	Edit	View
04/03/2009	testtq	Good	[Icon]	[Icon]



Using e²m

This shows, month on month, performance in each of the four focus areas

