



## Coach's Observation Rubric: The Consultative Pivot

**Roleplay Context:** The Sales Rep is conducting a discovery call with Marcus, an IT Director at a mid-market retail firm who is overwhelmed with disconnected tools and skeptical of adding more manual overhead.

**Instructions for the Coach:** Observe the 7-minute roleplay silently. Check the box that best reflects the Rep's behavior in each category. Use the "Notes" section to capture specific quotes. **You will have 3 minutes to deliver constructive feedback using the prompts at the bottom of this page.**

### 1. Active Listening & Validation

*Goal: The Rep must acknowledge Marcus's specific pain points without getting defensive.*

- **Needs Work (1):** The Rep ignores or minimizes Marcus's concern about tool overload and manual data entry. The Rep takes a defensive stance regarding the platform's value.
- **Competent (2):** The Rep listens but offers a generic validation (e.g., "I hear you, but...") before moving on to their pitch.
- **Masterful (3):** The Rep explicitly validates Marcus's frustration with data fragmentation and manual overhead, proving they understand his specific world.

### 2. Avoiding the "Feature Dump"

*Goal: The Rep must focus on solutions, not a laundry list of product capabilities.*

- **Needs Work (1):** The Rep relies heavily on a product-centric feature dump. The Rep suggests replacing their established CRM, increasing the prospect's perceived risk.
- **Competent (2):** The Rep discusses features but attempts to tie at least one back to the customer's business needs.
- **Masterful (3):** The Rep completely avoids listing standalone features and instead focuses the conversation on how NexaFlow enhances, rather than replaces, the existing ecosystem.

### 3. The Consultative Pivot & Value Proposition

*Goal: The Rep transitions the conversation to the specific value of the ConnectSphere API.*

- **Needs Work (1):** The Rep fails to mention the API or describes it purely in technical terms without explaining the business value.
- **Competent (2):** The Rep brings up the ConnectSphere API but struggles to articulate how it directly solves Marcus's problem.
- **Masterful (3):** The Rep successfully executes a consultative pivot, positioning the ConnectSphere API as the "connective tissue" that eliminates data silos and creates seamless workflows.



### 4. NexaFlow Sales Philosophy Alignment

*Goal: The Rep embodies the core values of customer-centricity and consultative selling.*

- **Needs Work (1):** The Rep appears pushy, focuses on short-term gains, or tries to force a demo before earning trust.
- **Competent (2):** The Rep is polite and professional but drives a vendor-to-buyer dynamic rather than a partnership.
- **Masterful (3):** The Rep demonstrates high customer-centricity and value-based selling, effectively moving the relationship from a vendor to a trusted partner.

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### Coach's Debrief Guide (3 Minutes)

*Use these prompts to guide your feedback session with the Rep:*

1. **Start with a Win:** "One thing you did incredibly well when validating Marcus's concern was..."
2. **Address the Pivot:** "When Marcus brought up his frustration with Salesforce and Slack, I noticed you..."
3. **One Area for Growth:** "In your next call, one opportunity to strengthen your consultative approach would be to..."