YOUR COVERAGE COACH

SALES EXECUTION KIT

30-DAY SALES OPERATING SYSTEM

Turn activity into consistency. Turn conversations into a process.

A practical implementation workbook for sales professionals who want measurable activity, better conversations, disciplined follow-up, and a repeatable path to the close.

THE PURPOSE

This kit is not designed to give you more information. It is designed to help you execute the fundamentals every day, track the right numbers, and identify exactly where your sales process is breaking down.

INSIDE THE KIT

Daily Scorecard • Discovery Map • Objection Framework • Follow-Up Cadence
Closing Checklist • Pipeline Tracker • KPI Calculator • 30-Day Plan

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START HERE

How to Use This Kit

Do not try to "complete" this workbook in one sitting. Use it as an operating system for the next 30 days.

1. Set your baseline. Record your current activity and conversion numbers before changing anything.
2. Choose your daily inputs. Focus on behaviors you control: conversations, discovery calls, follow-ups, proposals, asks, and next steps.
3. Use the frameworks in live conversations. Do not memorize scripts word-for-word; internalize the structure and keep your language natural.
4. Review weekly. Identify the stage where opportunities are leaking and make one focused adjustment for the next week.
5. Complete the 30-day review. Compare your ending numbers to your baseline and decide what becomes your permanent operating rhythm.

NON-NEGOTIABLE

Track the activity before judging the outcome. Sales performance becomes easier to improve when you can see where the process is breaking.

Core metrics to watch

Metric	What it tells you
New conversations	Are you creating enough opportunities?
Discovery conversations	Are prospects progressing beyond initial contact?
Follow-ups completed	Are open opportunities being actively managed?
Proposals / quotes presented	Are you earning the right to recommend?
Direct asks / closes	Are you actually asking for the decision?
Wins	What is converting into revenue?

Educational use notice: Use this material as general sales education and workflow guidance. Adapt it to your employer rules, industry requirements, applicable laws, and customer needs. No specific result is guaranteed.

FOUNDATION

01 The Sales Operating System

A strong sales month is usually the result of a strong daily process. The operating system below keeps your attention on inputs first, conversion second, and revenue third.

Stage	Objective	Primary metric
1. Opportunity Creation	Start enough relevant conversations	New conversations
2. Discovery	Understand the real problem and desired outcome	Qualified discoveries
3. Recommendation	Connect your solution to stated needs	Proposals / presentations
4. Objection Resolution	Diagnose uncertainty without arguing	Objections clarified
5. Follow-Up	Maintain momentum with a specific next step	Follow-ups completed
6. Close	Ask for a clear decision	Direct asks / wins

OPERATING PRINCIPLE

When one stage is weak, do not compensate with pressure at another stage. Fix the weak stage. More closing pressure will not repair weak discovery; more follow-up will not repair a tiny pipeline.

Your weakest stage right now

Why you believe it is the constraint

MEASURE BEFORE YOU CHANGE

02 Baseline Performance Snapshot

Use your last 30 days if available. If you do not have clean data, estimate once, then start tracking accurately from today.

Metric	Last 30 Days	Next 30-Day Target
New conversations		
Discovery conversations		
Proposals / quotes		
Follow-ups completed		
Direct asks		
Closed wins		
Revenue / premium / production		
Average sale / account value		

Baseline conversion checkpoints

Conversion	Formula	Current %
Conversation → Discovery	Discoveries ÷ conversations	
Discovery → Proposal	Proposals ÷ discoveries	
Proposal → Win	Wins ÷ proposals	
Conversation → Win	Wins ÷ conversations	

DO NOT HIDE FROM THE NUMBER

The purpose of a baseline is not to judge yourself. It gives you a reference point so improvement can be measured instead of felt.

CONTROL THE INPUTS

03 Daily Sales Scorecard

Complete this at the end of every selling day. Keep it factual. Do not turn the scorecard into a journal.

Activity	Target	Actual	Gap
New conversations			
Discovery conversations			
Proposals / quotes			
Follow-ups completed			
Direct asks			
Wins			

End-of-day diagnosis

Question	Your answer
What created the most momentum today?	
Where did opportunities stall?	
Which follow-up must happen tomorrow?	
What single behavior will I improve tomorrow?	

SCORE THE PROCESS

A day can be productive even if no sale closes. If the right volume of qualified activity happened and next steps were created, the process is moving.

WEEKLY VISIBILITY

04 Five-Day Activity Board

Use this page to see whether your week has enough volume before you start blaming scripts, price, leads, or objections.

Metric	Mon	Tue	Wed	Thu	Fri	Total
New conversations						
Discoveries						
Proposals / quotes						
Follow-ups						
Direct asks						
Wins						

Weekly volume checkpoint

What does the data say about my opportunity volume?

What will I change next week?

CONVERSATION QUALITY

05 Discovery: The 4-Part Map

Discovery is not interrogation. It is structured curiosity. The goal is to understand enough context that your recommendation sounds specific, relevant, and earned.

Part	Purpose	Example direction
1. Current State	Understand what exists today	“Walk me through what you are doing now.”
2. Friction	Identify what is not working	“What is the biggest frustration with that?”
3. Desired State	Define what better looks like	“What would you ideally like to improve?”
4. Decision Context	Understand timing, criteria, stakeholders	“What matters most when you decide?”

DISCOVERY RULE

Do not ask a question you do not intend to listen to. The value is not in asking more questions; it is in using the answers to guide the recommendation.

Your best discovery opener

Three follow-up questions that uncover detail

ASK BETTER QUESTIONS

06 Discovery Question Bank

Use these as prompts, not a script. Choose the questions that fit the conversation and your industry.

Category	Question prompts
Current state	What are you using today? How long has that been in place? What do you like about it?
Problem / friction	What is not working as well as you want? Where does this create the most frustration? What happens if nothing changes?
Priority	What matters most to you in a solution? Which issue would you solve first? What would make this worth changing?
Decision	Who else is involved? What will you compare? Is there a date or event driving the decision?
Commitment	If we can solve the issues you described, what would you want the next step to be?

Write 5 questions in your own language

USE IN LIVE CONVERSATIONS

07 Discovery Notes Sheet

Area	Notes
Prospect / account	
Current situation	
Primary frustration	
Desired outcome	
Decision criteria	
Timing	
Stakeholders	
Risk / concern	
Agreed next step	

BEFORE YOU PRESENT

Can you explain the buyer’s problem, desired outcome, and decision criteria in one or two sentences? If not, keep discovering.

DIAGNOSE BEFORE YOU ANSWER

08 Objections: The A.C.T.I.O.N. Framework

Treat objections as information. Your job is to discover what the objection actually means before trying to solve it.

Step	What to do
A — Acknowledge	Show that you heard the concern without becoming defensive.
C — Clarify	Ask what specifically is driving the concern.
T — Test	Determine whether this is the real issue or a surface objection.
I — Isolate	Confirm whether solving this issue would allow the decision to move forward.
O — Offer	Respond directly to the clarified concern.
N — Next step	Confirm the answer and ask for the appropriate next action.

EXAMPLE

Prospect: “It’s too expensive.” You: “I understand. When you say expensive, is the concern the total cost, the monthly payment, or whether the value justifies the difference?”

Your natural acknowledgment phrase

Your preferred clarification question

PRACTICE PAGE

09 Objection: “I Need to Think About It”

Do not attack the phrase. Clarify what the prospect needs to think about.

STRUCTURE

Acknowledge → Clarify → Isolate → Answer → Confirm the next step.

Possible clarification directions

- “Absolutely. What part would you like to think through?”
- “Is there anything specific that still feels unclear?”
- “Is the hesitation more about the solution, the timing, or the investment?”

Write your version

What answer would indicate the real objection?

What is the next-step question you will ask?

PRACTICE PAGE

10 Objection: Price / Cost

Price objections can mean several different things: budget, cash flow, comparison, unclear value, timing, or low urgency. Find the category before responding.

Possible meaning	Clarifying direction
Budget constraint	"Is the issue affordability right now or the total investment?"
Comparison	"What are you comparing this against?"
Value gap	"Which part of the value does not feel strong enough yet?"
Timing	"Would this make sense at a different time, or is the investment itself the issue?"

Your response framework

AVOID

Do not immediately discount. Discounting before diagnosing can train the prospect to negotiate and can destroy margin without solving the real concern.

PRACTICE PAGE

11 Objection: “Send Me Something”

“Send me something” can be legitimate, or it can be a polite exit. Your objective is to earn a specific follow-up instead of sending information into a void.

BETTER NEXT STEP

Clarify what information would be useful, send only what matters, and schedule the follow-up before ending the conversation.

Clarifying questions

- “What would be most useful for you to review?”
- “Which part are you evaluating?”
- “If I send that today, when should we reconnect to discuss it?”

Your send-and-follow-up script

Follow-up date / time:

BUILD YOUR OWN LANGUAGE

12 Objection Practice Grid

Objection	What it may mean	Your clarification question	Your next-step ask
I need to think			
Too expensive			
Send me info			
Not interested			
Happy with current provider			
Bad timing			

ROLE-PLAY RULE

Practice the clarification question more than the “comeback.” Strong objection handling begins with accurate diagnosis.

MANAGE OPEN OPPORTUNITIES

13 Follow-Up Cadence

A follow-up system should create value and preserve momentum without becoming repetitive or intrusive. Adjust timing to your sales cycle.

Touch	Timing	Purpose
1	Same day	Recap the conversation, confirm next step, send promised information.
2	1-2 days	Answer a relevant question or add one useful insight.
3	3-5 days	Check progress and restate the agreed objective.
4	7-10 days	Introduce new value: comparison, example, resource, update.
5	14+ days	Directly ask whether the priority is active, delayed, or closed.

THE RULE

Every open opportunity should have a specific next action and a date. “Follow up later” is not a next step.

Your normal sales cycle:

Your preferred cadence adjustments:

VALUE + NEXT STEP

14 Follow-Up Message Builder

Build follow-up messages with four parts: context, relevance, value, next step.

Part	Prompt
Context	Reference the previous conversation or agreed objective.
Relevance	Connect the message to something the prospect said matters.
Value	Add useful information, clarification, a comparison, or a recommendation.
Next step	Ask for one specific action: reply, call, review, decision, or meeting.

Write a short email follow-up

Write a text-message follow-up

Write a voicemail follow-up

NO LEAD WITHOUT A NEXT STEP

15 Open Opportunity Tracker

Prospect	Stage	Last contact	Next action	Date	Value

Pipeline rule: If there is no next action and date, move the opportunity to a deliberate nurture / closed status instead of pretending it is active.

EARN THE ASK

16 Closing Checklist

Use this before asking for the decision. A close is strongest when the prior stages were completed correctly.

[ ] I understand the prospect’s current situation.

[ ] I can clearly state the primary problem or desired improvement.

[ ] The prospect has confirmed what matters most in the decision.

[ ] My recommendation directly connects to those priorities.

[ ] Material concerns have been clarified and addressed.

[ ] The right decision-maker is involved.

[ ] Timing is understood.

[ ] I have earned the right to ask for a decision.

CLOSING PRINCIPLE

Be direct, then allow silence. Do not weaken a clear ask by talking past it.

Your preferred closing question

MAKE IT SOUND LIKE YOU

17 Closing Language Lab

Situation	Structure	Your language
Straight close	Summarize fit → ask for decision	
Choice close	Offer two valid implementation options	
Next-step close	Ask for the operational next step	
Concern close	Confirm objection solved → ask to move forward	

Practice: summarize the value in one sentence

Practice: ask for the decision in one sentence

Practice: what will you say after asking?

> **ANSWER**
>
> Nothing. Listen.

CLEAN DATA

18 Pipeline Stage Definitions

Your pipeline becomes useful only when each stage has a clear entry and exit condition.

Stage	Entry condition	Exit condition
New	Relevant prospect identified	Conversation attempted / started
Connected	Two-way conversation established	Discovery scheduled or completed
Qualified	Need, fit, timing, and next step understood	Recommendation / proposal presented
Proposal	Solution presented	Decision, objection, or follow-up date established
Decision	Prospect is evaluating / resolving final concern	Won, lost, or nurtured
Won	Commitment completed	Onboarding / fulfillment
Nurture	Not active now but worth future contact	Reactivated or removed

KEEP IT CLEAN

Do not keep dead opportunities in active stages. False pipeline volume creates false confidence and weak forecasting.

FIND THE BOTTLENECK

19 Pipeline Audit

Stage	Count	Total value	Average days in stage	Problem?
New				
Connected				
Qualified				
Proposal				
Decision				
Nurture				

Diagnosis questions

- Where is the largest concentration of stalled opportunities?
- Which stage has the longest average age?
- Are opportunities entering stages without meeting the entry condition?
- Which stage improvement would create the largest revenue impact?

The bottleneck I will attack this week

ONE REVIEW. ONE ADJUSTMENT.

20 Weekly Sales Review

Metric	Target	Actual	Change vs. last week
New conversations			
Discoveries			
Proposals / quotes			
Follow-ups			
Direct asks			
Wins			
Revenue / production			

What worked?

What stalled?

What is the ONE adjustment for next week?

SELF-CORRECTION

21 Weekly Coaching Questions

Use these questions to coach your process instead of reacting emotionally to individual wins and losses.

Did I create enough opportunity volume?

Did I rush discovery or presentation?

Which objection showed up most often?

Did I diagnose objections before answering?

How many active opportunities have a scheduled next step?

Did I directly ask for the decision when appropriate?

What should I stop doing?

What should I repeat?

What should I improve by 10% next week?

BUILD THE BASELINE

22 30-Day Execution Plan: Week 1

WEEK 1 OBJECTIVE

Create accurate visibility. Establish targets. Begin tracking every day.

Day	Primary action	Complete
1	Complete baseline performance snapshot	[ ]
2	Set daily activity targets	[ ]
3	Use the Daily Sales Scorecard	[ ]
4	Define pipeline stages and clean active opportunities	[ ]
5	Audit discovery questions	[ ]
6	Review the week's activity totals	[ ]
7	Choose one improvement for Week 2	[ ]

Week 1 commitment

IMPROVE CONVERSATIONS

23 30-Day Execution Plan: Week 2

WEEK 2 OBJECTIVE

Improve discovery and objection diagnosis without reducing activity volume.

Day	Primary action	Complete
8	Use the 4-Part Discovery Map in live conversations	[ ]
9	Write your five best discovery questions	[ ]
10	Review one stalled opportunity and identify missing discovery	[ ]
11	Practice A.C.T.I.O.N. on two common objections	[ ]
12	Clarify before answering every objection	[ ]
13	Review objection patterns from the week	[ ]
14	Choose one improvement for Week 3	[ ]

Week 2 commitment

FOLLOW-UP + PIPELINE

24 30-Day Execution Plan: Week 3

WEEK 3 OBJECTIVE

Eliminate vague follow-up. Every active opportunity gets a next action and date.

Day	Primary action	Complete
15	Audit every open opportunity	[ ]
16	Assign a next action and date to each active opportunity	[ ]
17	Use the Follow-Up Message Builder	[ ]
18	Remove or nurture dead opportunities	[ ]
19	Complete the Pipeline Audit	[ ]
20	Measure follow-up completion rate	[ ]
21	Choose one improvement for Week 4	[ ]

Week 3 commitment

CLOSE + CONSOLIDATE

25 30-Day Execution Plan: Week 4

WEEK 4 OBJECTIVE

Ask more clearly, review the full system, and convert the strongest behaviors into permanent habits.

Day	Primary action	Complete
22	Use the Closing Checklist before direct asks	[ ]
23	Practice your closing language	[ ]
24	Review one won and one lost opportunity	[ ]
25	Recalculate conversion rates	[ ]
26	Compare results with baseline	[ ]
27	Identify the largest remaining bottleneck	[ ]
28-30	Lock in your permanent weekly operating rhythm	[ ]

Week 4 commitment

WORK BACKWARD FROM THE GOAL

26 Personal KPI Target Calculator

Use your own numbers. If you do not know your conversion rates yet, use your baseline data and improve the estimate as tracking becomes more accurate.

Input	Your number
Monthly revenue / production goal	$
Average value per closed sale	$
Wins required (goal ÷ average sale)	
Proposal → win conversion	%
Proposals required	
Discovery → proposal conversion	%
Discoveries required	
Conversation → discovery conversion	%
Conversations required	

EXAMPLE LOGIC

If you need 20 wins and close 25% of proposals, you need about 80 proposals. If 50% of qualified discoveries become proposals, you need about 160 discoveries. Work backward until you reach the daily activity requirement.

SYSTEMIZE WHAT WORKED

27 Your Permanent Sales Rhythm

After 30 days, keep only the behaviors that create meaningful leverage. Your permanent operating rhythm should be simple enough to maintain.

Cadence	Non-negotiable
Daily	
Daily	
Daily	
Weekly	
Weekly	
Monthly	
Monthly	

My three permanent KPIs

The one stage I will continue improving

The habit I will stop

KEEP BUILDING

Next Step

You now have a practical operating system for activity, discovery, objections, follow-up, closing, pipeline management, and weekly improvement.

> **DO THIS NEXT**
> Run the system for 30 days. Keep the scorecard visible. Review your numbers every week. Improve one bottleneck at a time.

Your 30-day commitment

Signature: ______________________________

Start date: ____________________ **Review date:** ____________________

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Build the process. Track the numbers. Improve the system.

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