

Sales Coach Setup

Simply put, Sales Coach is a tool to help sales people sell. Sales Coach helps drive consistency across your entire sales organization and empowers your sales people by aggregating the materials they need in one place. Sales Coach allows sales management to suggest the right activities and content to sales people at the right time.

Sales Coach - Stage: Prospecting
[Close](#)

Stage Name

Stage Description Determine preliminary fit for requirements and budget

Activities to Move this opportunity to next stage:
1) Active project and business need confirmed
2) Timeline established and close month confirmed
3) Preliminary budget confirmed

Tools You Can Use
[IDC Whitepaper](#)
[Online Product Demos](#)
[Product Datasheets Content Pack](#)

Competitive Actions
[Familiarize yourself with competitive materials](#)

Questions To Consider
What is their business?
What is their pain?
Why do something now?



Setup:

1. Select an opportunity Stage Name(A) from the picklist. Once selected the administrator can define the Stage Description(B), Stage Activities(C) Content Sections(D), and Content Section Items(E) they want to display for the sales person. The “Item Content URL” field is a perfect place to link Salesforce Content such as PowerPoints, Spreadsheets, etc. This field is optional and can be left blank.

Note: If you desire more than 3 Stage Activities(C) or 3 Section Items(E), click Save and 3 more fields will appear.

2. Repeat the previous step for each Stage.

Home Sales Coach Setup Accounts Contacts Opportunities Reports Dashboards

Sales Coach Setup

Select Stage

A Stage Name: Prospecting

Save

Edit Stage Settings

B Stage Description: Determine preliminary fi

Edit Stage Activities

C Activity Details

Activity Details	Activity Ordering
Active project and business need confirmed	1
Timeline established and close month confirmed	2
Preliminary budget confirmed	3

Edit Sales Coach Sections

Section Name	Section Ordering	Section Width %	Section Items												
D1 Tools You Can Use	1	33	<table border="1"><thead><tr><th>Item Name</th><th>Item Content URL (ENTIRE)</th><th>Item Ordering</th></tr></thead><tbody><tr><td>E1 IDC Whitepaper</td><td>https://na1.salesforce.co</td><td>1</td></tr><tr><td>Online Product Demos</td><td>https://na1.salesforce.co</td><td>2</td></tr><tr><td>Product Datasheets Cor</td><td>https://na1.salesforce.co</td><td>3</td></tr></tbody></table>	Item Name	Item Content URL (ENTIRE)	Item Ordering	E1 IDC Whitepaper	https://na1.salesforce.co	1	Online Product Demos	https://na1.salesforce.co	2	Product Datasheets Cor	https://na1.salesforce.co	3
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[Close](#)

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D1 Tools You Can Use

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[Online Product Demos](#)
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D2 Competitive Actions

E2 [Familiarize yourself with competitive materials](#)

D3 Questions To Consider

E3 What is their business?
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