Dynamic Books 1:1 Guide

Use these questions to help coach your sales reps on how to better work their books and improve the dynamic books process on your team.

1 Book

How much of their target book are they working? If they're not working 75% or more of their book, why not?

Are there accounts in their target book that are unengaged? Why?

2 Activity

How many activities per account? How many contacts per account? Are they working accounts thoroughly enough?

How does their activity rate relate to how many demos they've set?

Are there accounts in their target book they could be engaging more deeply? How?

3 Returns

Have they returned accounts? How has that process gone?

Are there accounts they haven't been able to return? Why?

4 Feedback

Are there missing or confusing return reasons?

Have they found any data quality or ROE issues?

How are their assigned accounts? Any issues with their target book?

What other feedback do they have on the dynamic books process?