

Alex R.

Month: March 2026 Territory: Growth Zone 4 Manager: Josh Mellender

PREPARED 2026-03-02 · 20/60/20 POSITION: CORE · SANDLER FRAMEWORK

PRIOR MONTH REVIEW

METRIC	RESULT	NOTE
ATTAINMENT	92%	Just short of quota; strong second-half close.
DEALS CLOSED	7	vs. 5 target; two multi-product bundles.
STRENGTH	Discovery	Consistently surfaces pain before pitching.
GAP	Up-front contracts	Vague next-steps; 3 deals slipped a cycle.

CALL REVIEW NOTES

GRADED CALL · RIVERSIDE GRILL (3-LOC) · 2026-02-19 · SCORE 78/100

STRENGTH MOMENT — At 06:12, Alex ran clean pain funnel: "What's that costing you each month?" landed a quantified answer before any product talk. Textbook Sandler discovery.

GROWTH MOMENT — Call ended without an up-front contract for the next step. Owner said "send me info" and Alex accepted it. Lock a mutual next action and a decision date before hanging up.

THIS MONTH'S FOCUS

COACHING THEME

Own the next step — up-front contracts on every call.

- **Set an up-front contract at the top of all first meetings** (purpose, agenda, and a clear outcome) — target 100% of discovery calls this month.
- **Close every call with a scheduled next action.** No "I'll follow up" endings; book the calendar hold live before disconnecting.
- **Review two graded calls together weekly** in our 1:1, focused only on the open and the close, and track slip rate week over week.

TARGET

Book a firm next step on **90%+** of first meetings in March, and cut deal slippage to **≤ 1** deal for the month.