Manager / Coach Companion Guide for Jake R.

How to use the challenge-focused workbook to support the 90-day plan

Guide intent
This guide is meant to help a manager or coach turn the workbook into better sales behavior, better client trust, and steadier execution. It is written around likely development patterns suggested by the report, not fixed traits.

What this guide assumes

Jake likely brings visible strengths that can help in individual health insurance sales: energy, directness, social engagement, and willingness to lead a conversation. The report also suggests that he may move faster than some clients can process, may feel more strain from pushback than he shows, may drift into debate under pressure, and may need more recovery than others expect from his visible pace. Your role is not to reduce his edge. Your role is to help him use it with more precision.

Coach the tension, not only the behavior

A useful coaching stance with Jake is to notice the tension between what he shows and what he may need. He may look highly confident and highly energized while still needing respect, encouragement, private processing time, and room to reset. Coaching will likely work best when it is direct, specific, and respectful. Public correction, vague criticism, or overcontrol may reduce openness.

Main coaching theme
Slow the pressure, not the pace. Help him keep momentum while improving discovery discipline, objection handling, and recovery.

1. How to use the workbook in the first 30 days

Coaching goal
Improve discovery quality before recommendation quality. The first month is about slowing down at the right moments, not becoming passive.

Why this coaching focus is recommended
A fast, persuasive seller can look effective while still missing the client's real concern. In health insurance, that usually shows up later as hesitation, confusion, or weak trust. If discovery improves, close timing and client confidence usually improve with it.

Manager actions

- Review Worksheet 1 and Worksheet 2 together at the start of the first month.
- Ask Jake to identify the exact signs that he is moving too fast or shifting from guidance into pressure.
- Listen to how he describes the client's fear, not only the product fit.
- Require evidence of discovery before presentation in important opportunities.

Best coaching questions

- What did the client actually need, beyond the plan itself?
- Where did you slow down and earn more trust?
- What were you tempted to recommend before you fully understood the situation?

2. How to coach objection handling in days 31-60

Coaching goal
Help Jake respond to resistance without taking over the conversation or defending too hard.

Why this coaching focus is recommended
The report suggests pushback may carry more emotional charge for him than others see. If that happens, a strong style can sound sharper, more certain, or more competitive than the client needs. The coaching aim is to keep him effective under tension, not just agreeable.

Manager actions

- Use Worksheet 4 after tough calls, especially when the client pushed on price, trust, or timing.
- Coach him to name the concern, clarify the real issue, and then recommend a next step.
- When he sounds frustrated, ask what the objection meant to him personally and what the client may really have been asking for.
- Role-play two calm closing lines from Worksheet 5 every week.

Best coaching questions

- What part of the objection felt personal or frustrating?
- How could you keep the client feeling guided instead of corrected?
- What would a calmer close sound like in your own words?

3. How to coach consistency in days 61-90

Coaching goal
Protect follow-through, energy management, and weekly review so gains do not fade.

Why this coaching focus is recommended
Sellers with high pace and strong front-end energy can still lose points later in the process when routine work piles up or fatigue sets in. The final 30 days should reduce that drop-off and build habits that make performance more repeatable.

Manager actions

- Use Worksheet 6, Worksheet 7, and Worksheet 8 in a short weekly rhythm.
- Ask for a visible follow-through system, not just a promise to be more organized.
- Help him protect two short reset windows in the workday and one weekly review block.
- Look for patterns in delayed decisions, missing follow-up steps, and energy dips.

Best coaching questions

- Where did the process break down after a good conversation?
- What routine step are you still most likely to avoid?
- What did you notice about your energy, patience, or tone this week?

Worksheet-by-worksheet coaching notes

Worksheet	Manager note
Worksheet 1: Challenge pattern and trigger map	Use this to build awareness without blame. The value is helping Jake name early signals before they show up in a client conversation.
Worksheet 2: Discovery-before-recommendation planner	Ask to see whether the client's actual need, fear, and decision criteria are clear before solutions are discussed.
Worksheet 3: Client needs and tradeoff worksheet	Coach for honest tradeoff language. This reduces overselling and increases credibility.
Worksheet 4: Objection handling without debate	Use after hard calls. Listen for whether he is guiding the decision or trying to win the point.
Worksheet 5: Calm close readiness check	Use this to improve close timing. It helps separate a real buying signal from politeness or confusion.
Worksheet 6: Follow-through and routine discipline sheet	Ask for a visible workflow. Good intentions are not enough when routine work is the main risk.
Worksheet 7: Energy, pressure, and reset plan	Treat recovery as performance support, not weakness. Better pacing often improves tone and judgment.
Worksheet 8: Weekly self-coaching review	This is the learning loop. Review patterns, not only outcomes.
Worksheet 9: 30-day action plan page	Keep the behavior targets narrow. Too many goals will likely dilute follow-through.
Worksheet 10: 90-day scoreboard and reflection	Connect the coaching work to business results such as discovery quality, close timing, follow-through, and client confidence.

Suggested manager review cadence

Focus area	What to do	Done
Weekly	10-15 minute review of one worksheet, one live example, and one adjustment for the next week.	
Biweekly	Role-play one objection and one close using recent real cases.	
Monthly	Review the 30-day action plan and 90-day scoreboard; reset priorities if needed.	

Final coaching reminder

Jake is likely to improve most when coaching is practical, respectful, and tied to real client moments. He may not need more pressure to perform. He may need better pacing, better reflection, and clearer structure around the moments where strong energy can become unhelpful pressure.