



The Four-Box Coaching Model

One thing at a time — owned, repeated, named, focused.

Source: Sales Assembly Revenue Manager Lab
Module 4: Deal Reviews & Coaching

THE PROBLEM

Most managers run deal reviews like a pile-on. They walk in with five things the rep should be doing differently and dump them all in one meeting. Reps scatter, get defensive, and leave without a clear next move. Todd's line: *"Give them two and they're scattered. Give them three and they're pissed."* The result is coaching that feels like criticism, deals that don't actually improve, and reps who quietly stop bringing the hard stuff to their 1-on-1s.

THE FRAMEWORK: FOUR BOXES, ONE COACHING MOMENT

Run every deal review or coaching conversation through four boxes — in order. The rep names two wins and one gap themselves; you add one focused piece of coaching. They walk out with one thing to feel good about and one thing to work on. **Never more.**

BOX	WHAT YOU ASK	WHAT THE REP DOES	WHAT IT BUILDS
1 • OWN A WIN	"What's one thing you think you did really well?"	Names the win out loud. Doesn't downplay it.	Confidence and ownership.
2 • REPEAT IT	"Tell me one thing I think you did really well."	Hears the win named back, in your words.	Validation and pattern-matching.
3 • NAME THE GAP	"What's one thing you'd do differently next time?"	Identifies the gap themselves before you do.	Self-awareness without defensiveness.
4 • ONE FOCUS	"Here's the one thing I want you working on."	Walks out with a single clear action.	Focus — not overwhelm.

The point isn't to cover everything — it's to come back next week and do it again. Multiple short coaching moments beat one long lecture every time.

HOW TO APPLY IT

- 1 Block 20–30 minutes for one deal — not five.** Pick the deal that matters most, not the one that's easiest. Bring only people who can help (champion, CSM, AE) — not an audience. Don't make the rep prepare anything; the goal is honest reflection, not a performance.
- 2 Ask the four questions in order. Write the answers down.** Resist the urge to skip Box 2 — it's the one most managers skip and it's where validation happens. In Box 4, give **one** piece of feedback. If you have five, save four for the next four 1-on-1s.
- 3 Park multi-topic feedback for the end.** If a rep has CRM hygiene issues, pipeline gaps, AND a positioning problem, don't try to fix all three in one deal review. Use the Four-Box for the deal in front of you. Schedule separate coaching for the other patterns.
- 4 Close with one concrete next step.** Before the rep leaves, repeat the Box 4 focus and tie it to a specific moment: *"Next Wednesday on the Acme call, here's what we're going to do differently."* Vague coaching = no coaching.

THE IDEA THAT STICKS

"We only ever talk about one thing at a time. That's the whole method. You have to give them multiple opportunities to coach — not multiple things to fix in one sitting."