A DTI SALES TRANSFORMATION SERIES E-BOOK

SALES COACHING EXCELLENCE

The Path to a Best-In-Class Sales Force

MIKE KUNKLE

VP, SALES TRANSFORMATION SERVICES

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INTRODUCTION

There are a lot of parallels between the worlds of sales and sports. You don't have to look far to find books, blog posts, and countless articles offering analogies between these two oft-compared professions.

For all our fascination with applying sports principles to the business world, many in the sales profession ignore one of the most obvious lessons sports can offer: great coaching is critically important to a winning team.

Why is coaching ignored in sales? Let's face it. Frontline sales managers (referred to going forward as FLSMs) are responsible for coaching, and:

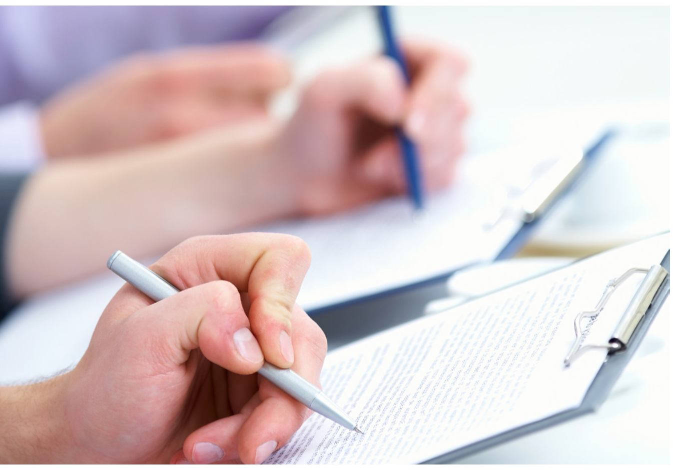
FRONTLINE SALES MANAGEMENT IS ONE OF THE MOST CHALLENGING JOBS IN BUSINESS TODAY.

It's easy for FLSMs to get lost in the minutiae of managing a team and a whirlwind of daily activity. Oftentimes, when they're pulled in different directions and expectations are high, they forget about coaching altogether. Think about what a FLSM is juggling at any given moment: Did my rep set that meeting? Are expense reports filed? Are projections for next quarter being submitted on time? Are we going to hit those projections? What major deals are veering off track? Why is the big opportunity with Company X being delayed again?

While some of these are important and others are urgent, this chaos of selling often distracts managers from the important work of being a coach – that is, connecting with their reps and developing them to realize their full potential. It's not about what the manager can do – it's about what they can develop their team to do.

In most sales organizations, FLSMs do seek out newer, better ways to get the sales results they're under pressure to deliver. In this effort, otherwise good leaders end up losing their way and take the path of least resistance by jumping into deals as "super-sellers" or focusing only on tactical sales advice, often in a highly-directive way. In doing so, these FLSMs miss the opportunity to coach and develop their reps to achieve sales mastery and dramatically improve individual and team performance.

There is a better way to achieve mastery levels and maximum sales effectiveness: sales coaching excellence.



Sales Coaching Excellence

The term "sales coaching" doesn't just refer to everyday sales management or sales leadership; we're talking about something very specific.

If you want to develop a best-in-class sales force, FLSMs need to:

- Analyze sales reps' performance
- Decide where to spend their limited coaching time to get the best results
- Determine the right interventions, based on situational analysis
- Identify ways to help reps maximize performance in targeted areas
- Guide reps to greater success with a coaching approach that's both engaging and motivating
- Establish a regular coaching cadence to help reps attain sales mastery and achieve better results

What is "Sales Coaching," exactly?

At a high level, let's define coaching in terms of **what**, **how**, and **why**.

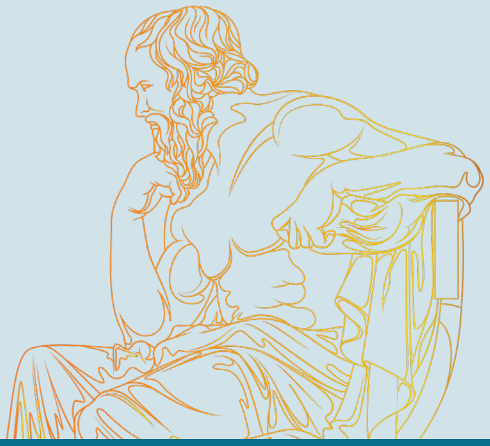
FLSMs might coach on a large variety of things, ranging from strategic, to tactical, to skills-based, to personal:

- Territory Optimization
- Account Planning
- Lead Management
- Sales Call Planning and Management
- Opportunity Management / Pipeline / Forecast
- Strategic Account Management
- Skill Development / Behavioral
- Time Management and Organization
- Career / Professional Development
- Mindset

The methods we'll discuss in this eBook have multiple applications, but will be primarily slanted toward skill development and behavioral coaching.

"The beginning of wisdom is the definition of terms."

Socrates



How to Coach

Coaching should be learner-centric, not coach-centric, and your approach to training and coaching should adapt based on your rep's current needs. All coaching should be respectful and engaging to the learner, but the models you use may vary.

There are two simple models for teaching and validating knowledge and skill that will guide reps to more effectively use what they know and improve what they do. These approaches are:

DIRECTIVE	FACILITATIVE
Telling, discussing, showing, validating knowledge and skill	Questioning, listening, involving, engaging, leading

Why Coach

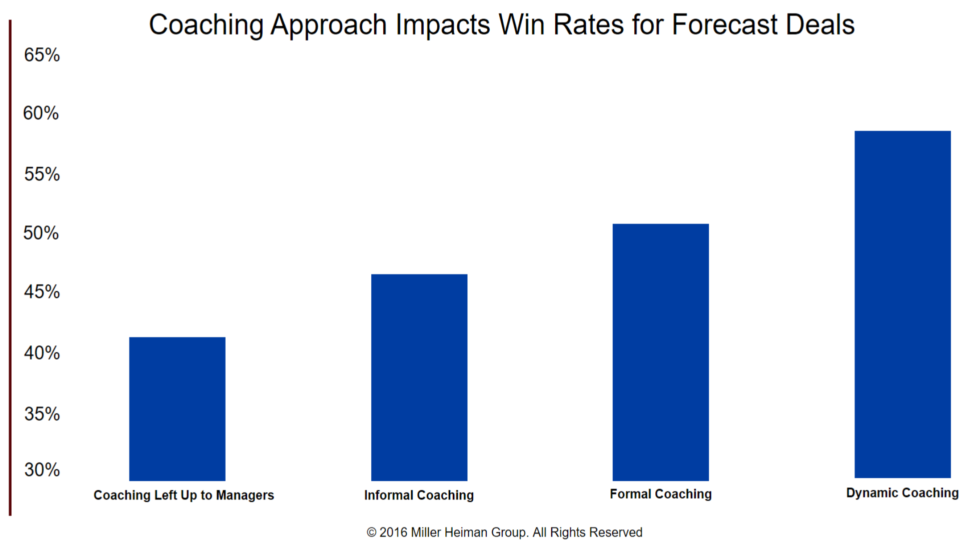
We hope the value of coaching is inherently clear, but for the skeptics, here are some data points that support its power:

- High-performing firms provide 15 to 20 percent more coaching compared to other firms. [Source: Sales Management Association research brief: Measuring Sales Management's Coaching Impact]

- No other productivity investment comes close to coaching for improving reps' performance. [Source: Harvard Business Review via the Sales Executive Council of the CEB]

- In one organization, sales training increased productivity by 22.4 percent. Coaching, however, which included goal setting, collaborative problem solving, practice, feedback, supervisory involvement, evaluation of end-results, and a public presentation, increased productivity by 88 percent. [Source: Executive Coaching as a Transfer of Training Tool]

- When the (coaching) approach gets formalized, the win rate improves a significant 5.3 percentage points above average for an actual improvement of 11.5%. The results are even more impressive for a dynamic approach that is based on a holistic sales force enablement program that connects the enablement and the coaching frameworks. In this case, the win rate climbed by 12.9 percentage points, which is an actual improvement of 27.9%. What sales leader can ignore a 27.9% better win rate? [Source: 2017 CSO Insights Sales Manager Enablement Report]



Obviously, coaching gets results. So, let's start our journey on the path to sales coaching excellence by learning how to determine where to spend your time to get the best results.

A Note to Our Readers

We acknowledge and are grateful our readership includes executives and sales leaders, as well as various sales support leaders (sales operations, sales enablement, sales training, and others). We also recognize and respect that it's you who will do the work of implementing the methods we will write about in this eBook, organization-wide, in your respective companies. We tip our collective hats to you, and stand ready to support you, as needed.

For the remainder of this eBook, we're going to speak to – and dedicate this white paper to – all the FLSMs out there, who have one of the most challenging jobs in business today.

FLSMs, we'll provide simple yet highly-effective methods for getting the most out of your sales talent. At the end, you'll have what you need to follow a proven-effective path to develop sales coaching excellence, and as a result, develop a best-in-class sales force. As you do that, however, remember to involve, lean on, and collaborate with your organization and sales support leaders. As always, you'll achieve the best results through an aligned, integrated, and collaborative change effort.

How to use Sales Analytics to Determine Where to Spend Your Time

While there are no magic bullets for developing sales coaching excellence, you can achieve a significant lift in sales team performance by laying a strong foundation. This is a necessary first step to determine where time should be spent coaching to get the largest possible return for your time and effort.

Let's focus on a simple two-part methodology to lay this foundation:

- Preparation / Prework
- Pipeline Analysis

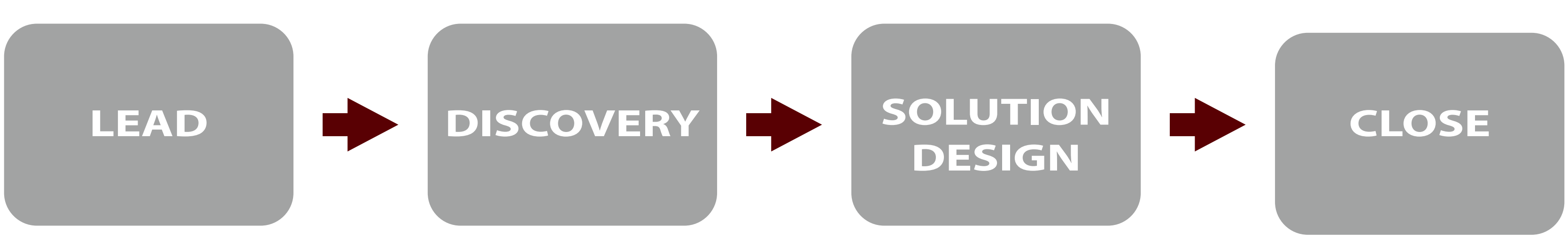
Preparation / Prework

In today's sales environment, neither portion of this two-part methodology should be a barrier, and many organizations already have cleared these hurdles.

Sales Process

Let's define sales process simply as the stages your reps and buyers move through to reach a buying decision.

Sales process stages range from lead generation through opportunity pursuit to the sale, and onto strategic account management. Your sales process should be aligned with your customers' buying process. For both processes, start by defining and aligning the stages, document the tasks performed in each stage, and the exit criteria (ie: what must be completed in each stage before moving to the next).



Sales Methodology

This is a term that often confuses people. Simply, sales methodology is what your reps do in each stage to move an opportunity to its next stage.

You should document what your top reps do in each stage as your sales teams' current best practices.

Note: If you have already defined the tasks for each stage previously, this isn't a repeat of that work. These are the sales frameworks, models, skills, and behaviors – not just what your sales rep should be doing in each stage, but also how they should be doing it (and sometimes, when and where).

CRM / Pipeline Tracking

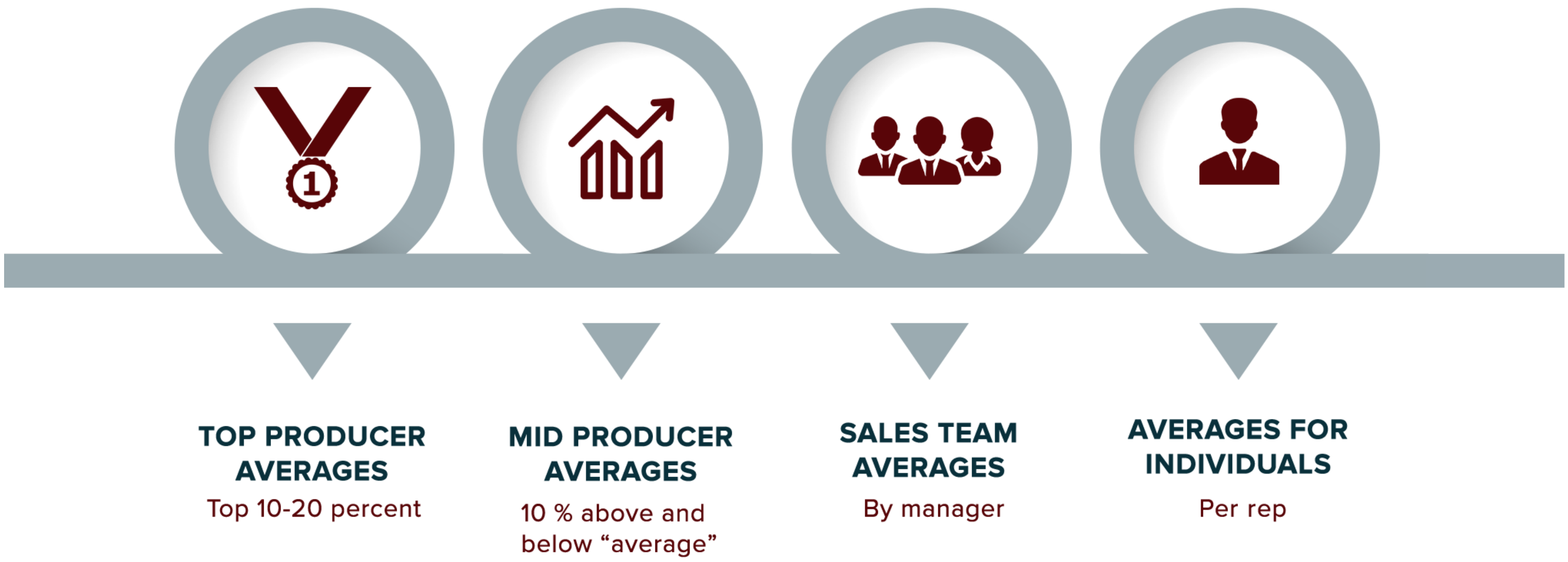
Using a CRM is recommended, but at a minimum, find a streamlined way to track the progression of opportunities through your pipeline.

Most large organizations have a sophisticated CRM; smaller organizations may need to implement a simpler one. They come in all shapes, sizes, price ranges, and levels of ease or complexity and ability to customize.

For this purpose, you need the ability to track:

1. **Your sales process stages**
2. **Number of opportunities in each stage**
3. **Conversion rations between stages**

In addition, you'll want to enable reporting on a few specific buckets of performers:



Considerations:

- Look back over a rolling number of months to produce the number of opportunities per stage and conversion averages. This is nuanced to every specific business, so there isn't one number or approach that will work for everyone. We usually recommend a backward look that is at least as long as the average sales cycle. You can use the total number of opportunities per stage or the average per month over the period reviewed. It may be easier to use the raw totals, which also reduces the vagueness of working with averages.

- If you decide to work with averages, you might want to experiment with looking at the mean, median, mode, and range of the conversion data set, remove distant outliers, or build an algorithm. For the analysis we have planned, something simple should work.

- Track other metrics, like average deal size, velocity, sales productivity (revenue per producer), and win/loss ratios. For this sales analysis we can start with a snapshot of the number of deals in each stage of the pipeline over a specified time, and the conversion ratios between stages.

- Seek support from your sales operations leader, a business analyst or data analyst, or a consultant, as needed.

With the prework in place, it’s time to do some very specific pipeline analysis for targeted improvement.

The Enabling Dashboard

This is not the dashboard to use daily, but when looking to improve production, this is a great place to start.

This chart shows why the Preparation stage is important. The data in this example has been greatly simplified for illustrative purposes and the process stages are only examples – you’ll need to customize based on your needs.

Top Row

The process stages

Left Axis

Rows for the top producers, mid-tier producers, your sales team (or one manager’s team), and the results for the individual reps on that team (this example has two reps)

Within the dashboard

The number of leads or opportunities being worked in each stage in the period being reviewed (likely a historical review over the length of the average sales cycle, at a minimum).

In-between stages in dashboard

The conversion ratios

Pipeline Analysis for Targeted Improvement – Fig. 1

	Lead		Opportunity		Proposal		Presentation		Close
Top Producers	100	50%	50	80%	40	75%	30	67%	20
Mid Producers	80	44%	35	63%	22	59%	13	54%	7
Your Team	79	38%	30	60%	18	72%	13	54%	7
Rep 1	50	40%	20	50%	10	70%	7	57%	4
Rep 2	40	50%	20	80%	16	75%	12	33%	4

The Analysis

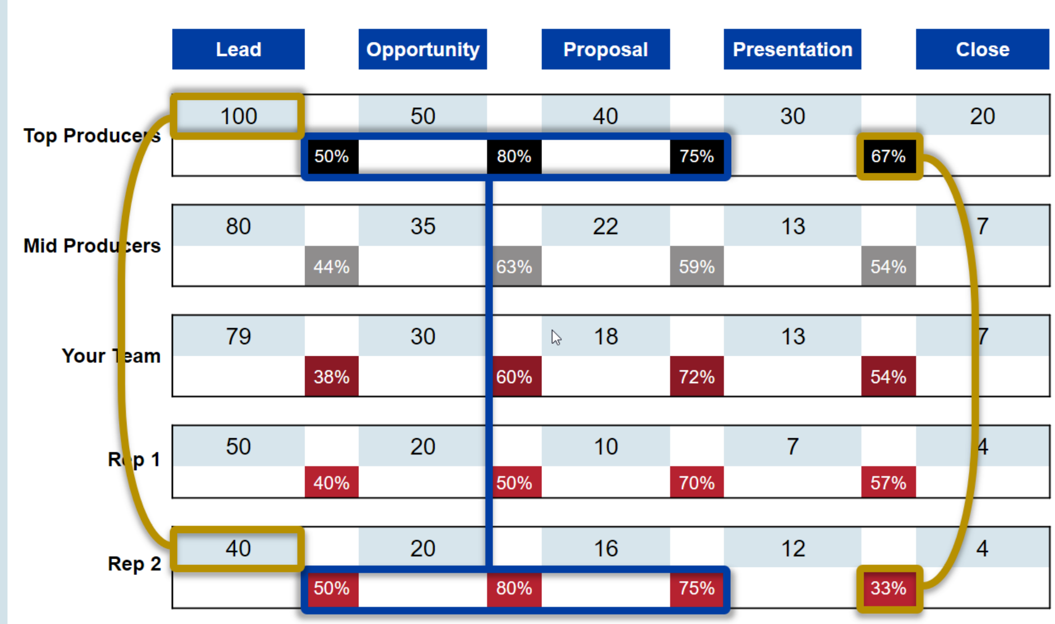
If there is any magic involved, it happens in the comparison of your reps and the reps in the other categories.

Let’s look at the example we’ve developed, starting with Rep 2.

You’ll notice:

- She’s working with fewer leads than the top producers (or anyone shown, including Rep 1).
- Her first three conversion ratios rival the top producers.
- Her ability to move deals from the Presentation to Close stage is far lower than the top producers, average producers, or your team.

Pipeline Analysis for Targeted Improvement – Fig. 2



From this analysis, you can see what you need to do:

Help her generate more leads and improve her last conversion stage.

Rather than trying to make the leap to top producer status, let's start by trying to get this rep to your team average of 70 leads and a final conversion ratio of 54 percent. If she can improve in both these areas, she'll deliver a 64 percent improvement in closed deals. That's a significant lift.

Let's say your average deal size is $10,000. This would equal $70,000 per month or $840,000 a year. Extreme example? Not really. This can happen at any organization, when FLSMs analyze and follow-up to coach effectively.

Here's another example, looking at Rep 1:

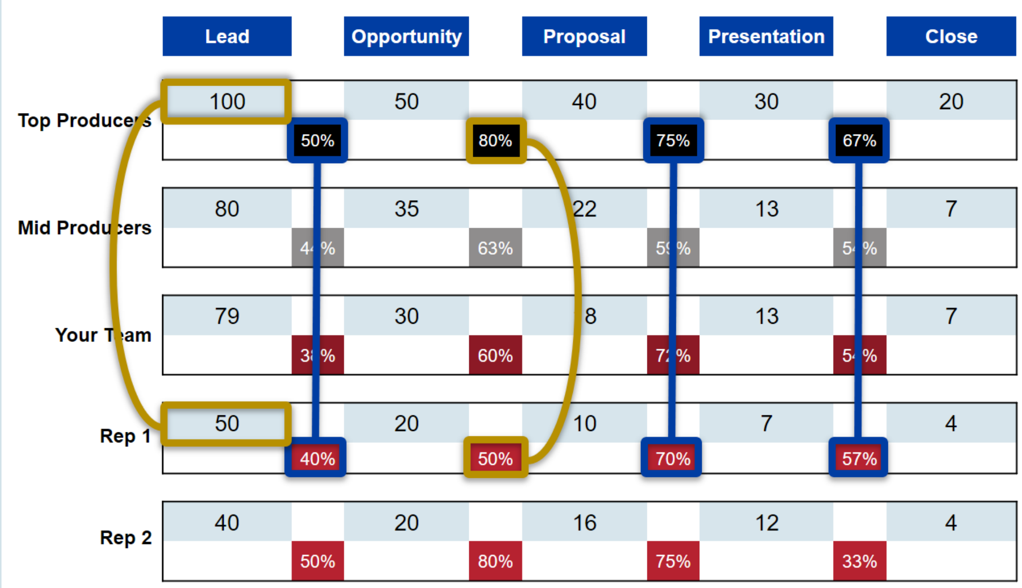
It appears:

- Rep 1 has lift opportunity in multiple places, but most of the conversion rates are average and not too far off the top producer rates.

Looking for the biggest gaps, you can probably get the best return for coaching effort in two areas:

- Guide the rep toward best practices in Lead Generation.
- Help the rep convert more Opportunities to Proposals.

Pipeline Analysis for Targeted Improvement – Fig. 3



On your own team, Rep 2 might be able to offer mentoring and guidance in return for help from Rep 1 in improving Presentation to Close conversions. You should be involved too, but this presents a good opportunity for peer coaching, where team members can learn from and support each other.

The point is, this simple analysis offers you direction about where to spend your time with your reps to get the best return for your coaching efforts. Consider the difference in the following two scenarios:

SCENARIO 1

"Hey Ruth. I'm available next Tuesday and would like to ride along with you. What can you get scheduled that day?"

SCENARIO 2

"Hey Ruth. I'd like to spend some time with you when you're working with buyers in Stage 4, moving toward the close."

Notice the difference? The second will be more likely to provide a chance for you to help your rep improve performance in an area that will lift her results.

Note: The dashboard and analysis methods recommended in this section are designed to help you determine where to spend your limited, valuable, coaching time. For clarity, this is not an attempt to determine which reps should receive coaching and which shouldn't. All your sales reps deserve field training and coaching. These methods will help you determine how to spend you time with each.

How to use ROAM to Analyze What to Coach and Benchmark Against Best Practices

Once you know where to focus your attention for the best possible return, the next step is to identify areas for improvement. ROAM is a performance diagnostic model you can use to do this.

RESULTS
OBJECTIVES
ACTIVITIES
METHODOLOGY

Results

Results are the outcomes a rep has achieved. This includes both lead and lag indicators.

Lag Indicators are the outcome for the sales role being assessed.

- For a Sales Development Rep (SDR), whose job is to set appointments, the lag indicator would be an appointment scheduled.
- For an Account Executive, whose job is to qualify leads, create opportunities, pursue them, and close them, the lag indicator would be a deal closed and won.

Lead Indicators include any measurable interim outcomes that progress toward the lag results.

- For a SDR, whose job is to set appointments, lead indicators include things like the number of calls made, number of conversations, or number of follow-up attempts.
- For a full-cycle Account Executive, whose job includes both prospecting and opportunity management, an appointment is a lead indicator.
- For an Account Executive, whose job is to qualify leads from an SDR, create opportunities, pursue them, and close them, the lead indicators include things like meetings run with prospective customers, number of new contacts made inside a current account, opportunities added to the pipeline, deal velocity, conversion rates, and more.

Assessing results creates a starting point for where to coach for a quick-hit improvement.

Objectives

Next, you compare **Results** to their **Objectives** (like goals, quotas, benchmarks) to see how well they're doing. In the previous chapter, for example, you benchmarked pipeline conversion ratios to determine where your reps could improve, when compared to top and mid producers as well as your team averages. That's similar, but compares your rep's performance results to others. Now, you are comparing your rep's performance against their goals and objectives.

This process helps prioritize where you start.

If a rep has the opportunity to improve – based on comparison to top and mid producers – in an area where they are already meeting performance standards, that is a good opportunity. But, it is not as important as helping them improve in an area where they are not meeting expectations, based on their pre-determined goals and objectives.

In the best-case scenario, you can help the rep lift performance to meet all expectations, and then work to lift performance even higher based on the benchmark comparisons. Having both perspectives gives you options and a path to follow with any given rep to continually improve their performance.

With that said, when there's a gap between the current **Results** and the **Objectives** you need the rep to achieve, you need to dig deeper to find out why that gap exists and what you can do about it. This is the next step toward sales coaching excellence.

Activities

To analyze the shortfall, you should start by inspecting the **Activities** that delivered those results. This analysis should include where activities are being done with target prospects of customers, what activities are being done, and how much of each.

This type of analysis is important because:

Your rep might spend too much time focused on the wrong activities.

Your rep might do the exact right things, and do them well, but the activities are aimed at the wrong target prospects.

Your rep might be doing the exact right things, but isn't doing enough of them.

This analysis includes selling activities, such as prospecting/appointment setting metrics, but it can also include tasks performed in their lead generation and sales processes. This could include buyer targeting, qualifying opportunities, selecting pursuit team members, analyzing needs, designing solutions (selecting/configuring the right solutions), developing proposals and presentations, leading meetings, and more.

Are they approaching the right buyers? (Who)

- Where is the rep's activity targeted? Is your rep approaching the right prospects and customers, or chasing pipe dreams or low-value targets?

Are they doing the right things? (What and Why)

- What activities is the rep doing?
- Are they doing enough (quantity) of each?
- Is there enough of a mix of the right lead generation and opportunity development and management activities to get results

Through an analysis of activities, you may find the solution to close the performance gap Unfortunately, you may learn that your rep is doing the right activities, the right amount of times, with the right target buyers. In this case, if they're still not getting results, it's time to more deeply inspect methodology.

Methodology

Methodology is the quality metric, where you need to explore how well reps are doing the activities.

These activities include:

- Sales competencies
- Using frameworks, models and skills
- Behaviors
- Sales messaging and sales conversations

This is where all the known practices should be brought together, that if used well, will raise the level of your rep's performance.

Are they doing the right activities correctly (how, when, where) and to what level of mastery (how well)?

- What is the quality of each activity or task?
- Is the rep doing them at the right time and place?
- What approaches are they using?
- How well is the rep executing – to what level of sales mastery?

It's critical to be doing enough of the right activities with the right buyers, and doing them well. It won't matter if a rep is engaging often with the right buyers. If they fumble their way through, results will be poor. This is where your knowledge of best practices or internal top producer practices can deliver real value to your team. Using the Sales Analysis method from the first chapter, if you've identified a gap to close between stages 3 and 4, you need to discuss and observe what they are doing, with whom, how often, and how well, in that stage.

When you see gaps between what known top producers do and how well they do it, this is your opportunity to assess whether your rep needs training or coaching, or some other intervention. In any case, if you know the best practices that get results, you likely have the content to help your rep close the gap. We'll discuss how to determine the best performance intervention in the next chapter.

Summary

As you work through the ROAM model, you need to do your own sales analysis in advance, but also:

- Engage your rep
- Ask great questions
- Observe them in action
- Possibly speak with their prospects and clients
- Utilize your organization's Win/Loss Analysis data, to get the full picture of their activities and methodology.

How to Use Performance Analysis to Determine the Best Performance Intervention

At this point, you identified where to explore performance gaps and conducted an analysis of activities and methodology. Depending on what you've learned, the best possible solution could vary.

While we will retain our focus on skills development areas that can be addressed with field training and coaching, it's important to use the best solution or performance intervention for the root cause problem.

FAR TOO OFTEN TRAINING IS APPLIED AS A SOLUTION TO A PROBLEM IT CAN'T OR WON'T SOLVE.

To avoid that, here are two performance analysis models from respected experts that will keep you on track (and offer ideas outside of training and coaching, as applicable).

The two tools are:

- The **Conditions, Reasons and Solutions for Performance**, adapted from Ferdinand Fournies' work.
- The **Performance Analysis Flow Diagram**, from Robert Mager and Peter Pipe, now available through the Mager Consortium.

The Conditions, Reasons, and Solutions for Performance

Condition	Reasons	Solutions
Don't know something	What to do Why to do it How to do it	Training Coaching
Incorrect thinking	Their way is better Your way won't work Something else is more important They are doing it (lack of feedback)	Coaching Counseling
Misaligned consequences	A negative consequence for doing it No negative consequence for not doing it A positive consequence for not doing it No positive consequence for doing it	Manage consequences
Constraints	Obstacles beyond their control Personal limits (incapacity) Fear (anticipating failure) Personal problems No one could do it	Counsel Change Transfer Terminate

This is a valuable tool that we have adapted from Ferdinand Fournies' book, Why Employees Don't Do What They're Supposed To Do and What To Do About It.

If you look at the diagram, you'll see the condition that exists, the reasons why employees don't do what they are supposed to, and the type of solution you can apply.

Don’t Know Something

In the first section, the employees don’t know:

- What to do.
- Why to do it.
- How to do it (possibly including When and Where, as appropriate).

The Solution: Training first, then coaching. Training is appropriate when your rep doesn’t know these things, or has forgotten. Coaching is appropriate when they know, but have room for improvement.

This is the section where we will spend most of our time in the eBook, but it will be helpful to see the rest to know when training and coaching are not the right solution.

Incorrect Thinking

Mindset is next, where they think:

- Their way is better.
- Your way won’t work.
- Something else is more important.
- They think they are doing it (which is a lack of feedback).

The Solution: Coaching or counseling.

Misaligned Consequences

Next are misaligned consequences, where the rewards or punishments for behavior are not appropriate.

The Solution: Align consequences. From an organizational perspective, this is beyond the scope of our eBook on sales coaching excellence. Individually, you may have an opportunity to address consequences for the action plans that result from your coaching activities.

Constraints

The last section is constraints. This is when there are real and valid reasons for the employee not doing what you want, including:

- Obstacles beyond their control.
- Personal limits (incapacity).
- Fear or anticipating failure.
- Personal problems.
- And the fact no one could do it (which is rare but possible).

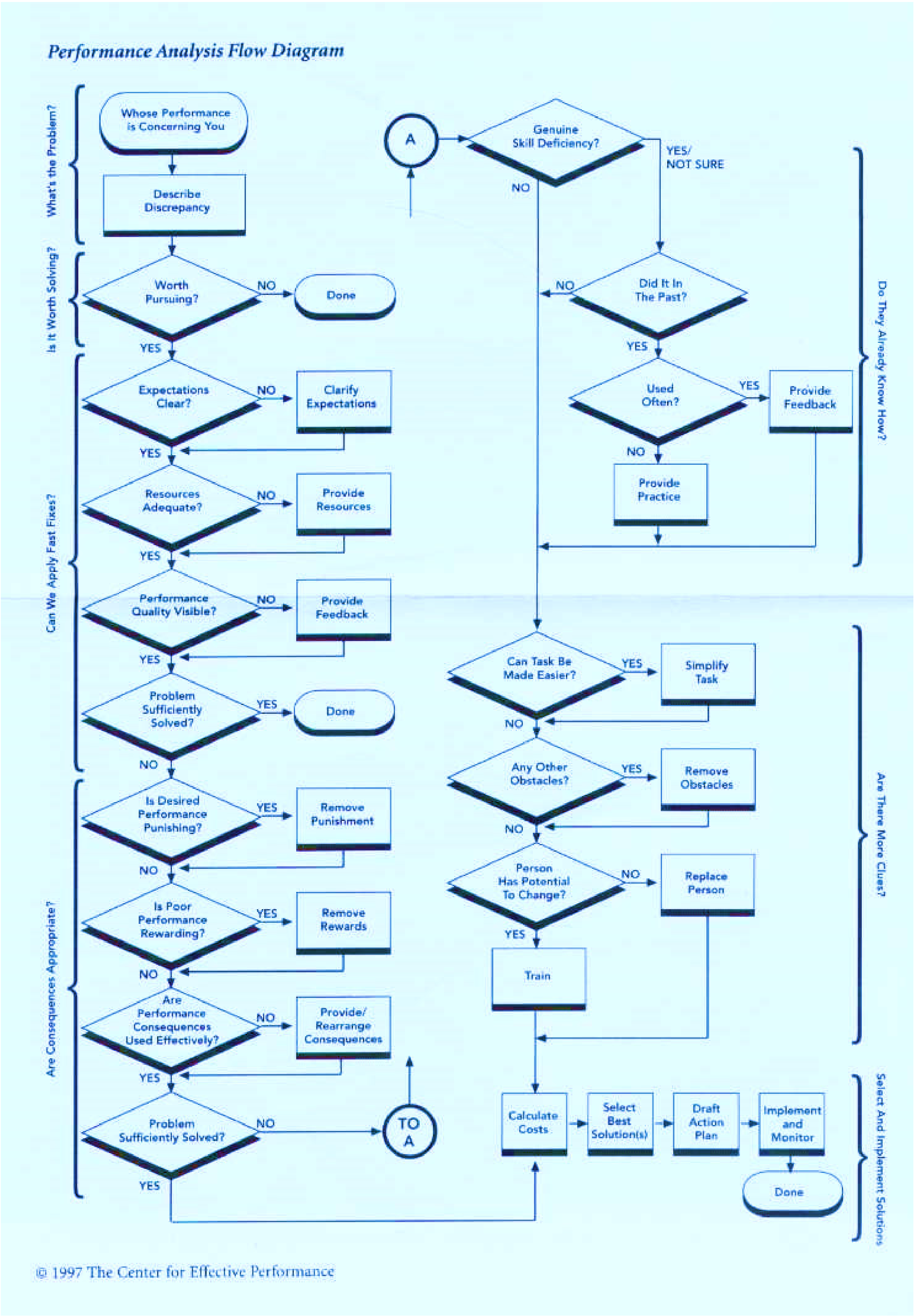
The Solution: This is a variable, complex category, where the solutions might include counseling, making organizational changes, transferring a good employee to a role that’s a better fit, or compassionately returning them to the work pool to find success elsewhere, and replacing them with someone who can do the job.

The Performance Analysis Flow Diagram

This is another valuable tool from Robert Mager and Peter Pipe's book, Analyzing Performance Problems, copyrighted now by the Mager Consortium. (The tool underwent updates by Mager and Pipe in 1997 and this is version we're referencing here.) Due to its size, the graphic is in the Appendix or you can link to a version here. Starting in the upper left and following the flow chart, it walks you through:

- What's the problem?
- Is it worth solving?
- Can we apply fast fixes?
- Are consequences appropriate?
- Do they already know how?
- Are there more clues?
- Select and implement solutions.

You can see some similarities to the approach adapted from Fournies' work, with Mager and Pipe's being more inclusive from an organizational performance perspective. To quickly diagnose whether training or coaching is the right solution (and to ensure neither is the wrong solution), either works, but the tool adapted from Fournies may be the easier approach for FLSMs.



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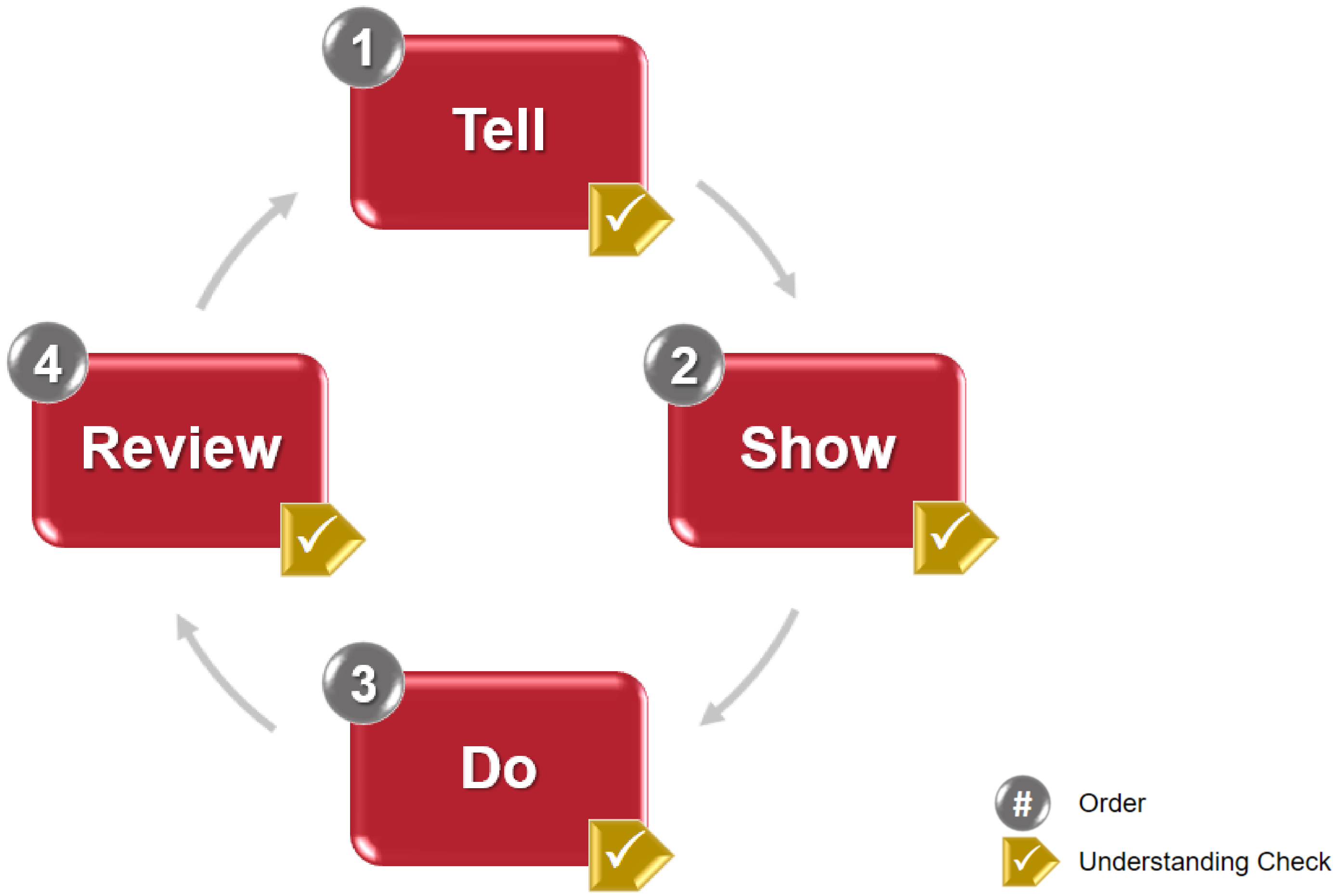
How to Conduct Field Training

When you have:

- Conducted an analysis to know where you can have an impact
- Have diagnosed the performance gap by analyzing the activities and methodology compared to known best practices
- Determined the rep needs to know what to do, why to do it, and how to do it (the activities and methodology), to close the gap…

…you're ready to do some field training.

For this, we're going to offer a very simple but proven-effective model:



The model is **Tell, Show, Do, Review** and the super-charger is the **Understanding Check**, which validates both communication and capability. This simple-but-powerful validation technique is seriously underutilized.

This is not new and not complicated. The magic of this method, however, is in the disciplined execution of this four-step model:

Tell

Tell the rep what to do. Keep in mind that this is training (meaning they're not sure what to do, why to do it, or how to do it), so being directive is acceptable. It can also be highly effective to engage the rep to see what they already know, and then close any gaps. In the end, the most important outcome is that you've communicated and agreed on what you expect them to do.

Then, in the **Understanding Check**, you ask the rep to summarize their understanding back to you. Don't leave this stage until the rep can summarize it accurately to your complete satisfaction.

Show

Next, for skills-based learning, you **Show** them how it should be done through role-playing. We believe role play works best here because you can control the situation from a learning perspective. If necessary, you can also demonstrate live with a customer, have them role play with others who can demonstrate what should be done well, have them ride with a top producer who you know will demonstrate properly, or use a video demonstration, if you have one. For expediency and effectiveness, though, we recommend role playing in real-time, with you, their manager.

Then, in the **Understanding Check**, they role play it back to you. Role-playing back validates that the rep not only understands it, but can do it. (Doesn't mean they will, on-the-job, but it does mean they can.) There are video and virtual coaching tools as well as live virtual role play services that can support this, if you are not always able to do it in-person, in real time.

Do

In this stage, the FLSM or a seasoned rep should demonstrate the skills live, in a real selling situation, on the phone or in person.

Then, in the **Understanding Check**, observe the rep with a prospect or customer.

This model addresses that the rep clearly understands expectations, validates that they can do it, and further shows that they will do it in live selling situations.

If you can't get through these three stages successfully without a breakdown, it will never happen to any degree of certainty, regularity, or mastery, in the real world.

Review

Even if what's taught in field training is used by reps in the real world, it doesn't guarantee mastery. That's where the **Review** stage comes in. After the real-world observation, you and your rep need to meet to discuss how it went and review the rep's performance together. Technically, we still consider this part of the overall training process, since you are targeting a specific skill or set of skills that were just learned. This is also the beginning of coaching.

To recap, here's why this method is critical:

1. It makes expectations crystal clear for your rep, and helps them develop the skills that will close their performance gap.

2. It is the ultimate excuse remover. Your rep has demonstrated that they understand and can do what will improve their performance.

3. Your upfront investment will reduce the time spent on these skills in the future. Our advice: do it right once rather than ineffectively and repeatedly.

If your rep doesn't use the skill after a cycle of Tell, Show, Do, Review (or doesn't do it well), you can:

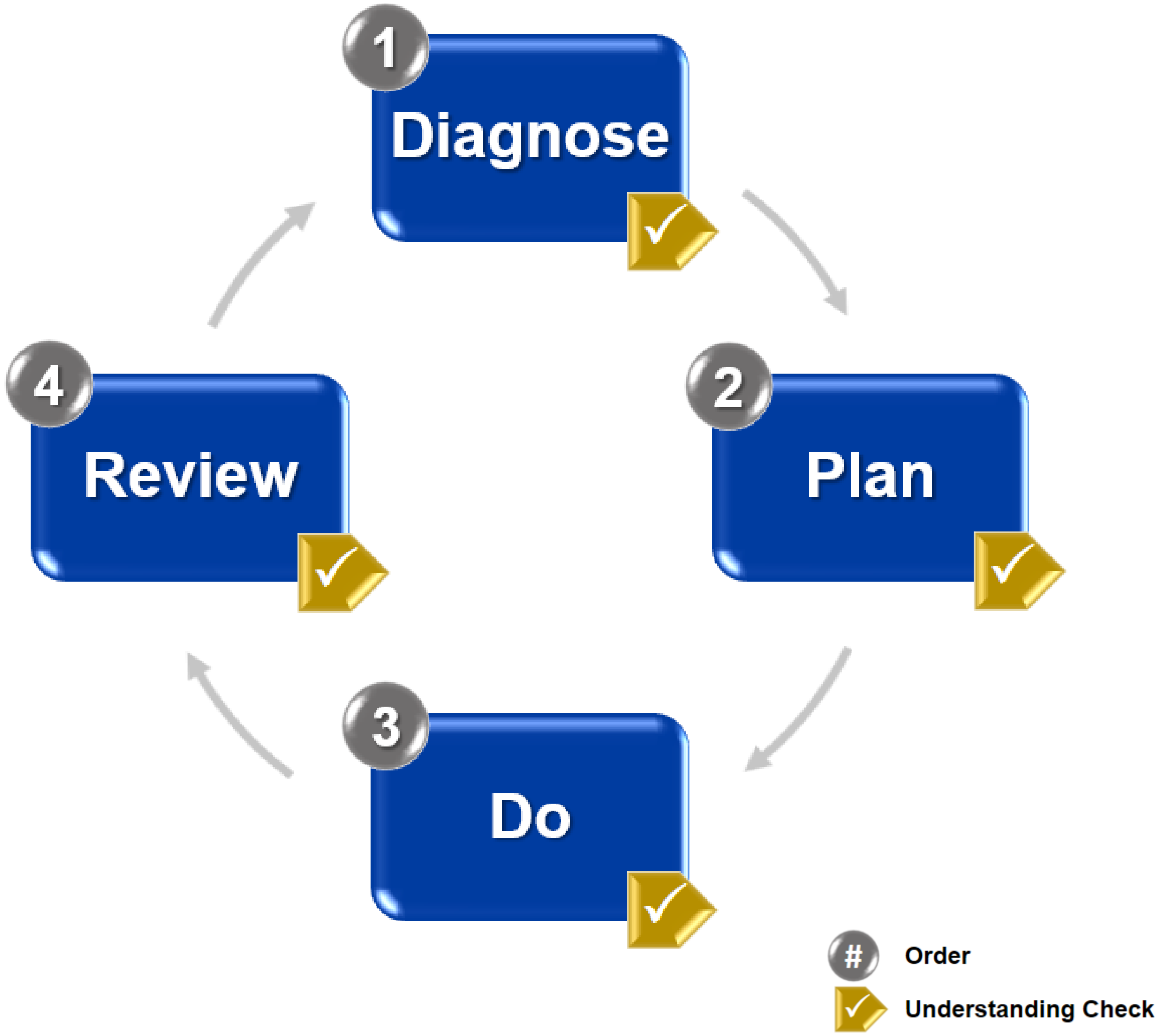
- Coach to help them improve on what they know (discussed in the next chapter).
- Begin to explore other reason on the **Conditions, Reasons, Solutions for Performance** chart and address them.

How to Conduct Field Coaching

After deciding where to direct your coaching efforts and diagnosing with ROAM, you will train, coach, or apply another intervention from the **Condition, Reason, Solutions for Performance** chart.

You may arrive at field coaching after having done training using the **Tell, Show, Do, Review** model with **Understanding Checks**, or you may have uncovered an issue where coaching is immediately the right solution.

Sales Coaching Excellence



As mentioned, the model is Diagnose, Plan, Do, Review with Understanding Checks. As with the previous model, the key is disciplined execution.

Diagnose

The first stage is Diagnose, where you assess the situation for improvement possibilities. If you're continuing from a previous training plan, this is already identified.

If not, you'll start with a new diagnosis. To do that, you should continue to use ROAM (Results, Objectives, Activities, Methodology). The goal is to identify with your sales rep "What Is" (Point A), with "What Should Be" (Point B).

This can be done through:

- Reviewing results and reports
- Discussion
- Observation

This should be done in preparation of meeting with your rep, but you may also guide them through the journey as well (or request they do some prework, too), getting their input and perspective along the way.

Comparing Results to Objectives, you jointly determine "what should be" (Point B).

Then, in the **Understanding Check**, the rep summarizes what you've diagnosed, including "what should be" or Point B, to ensure mutual understanding

Plan

Now it's time to develop and agree on a plan to close the gap between Point A and Point B. Through an analysis of the activities and methodology (which may require observation) and problem-solving, you'll develop this plan jointly with your rep.

This is different than field training, where you teach the rep what to do, why to do it, and how to do it. While rep engagement and involvement is important when training, this process should be far more facilitative and engaging. You are the guide or Sherpa, and your rep must be engaged, thinking, problem-solving, actively participating, and ultimately, owning the solution they are going to implement.

Plan – The Methodology of Sales Coaching Excellence	
Who	Coach and Sales Rep
What	Phone call, virtual meeting, or face-to-face meeting
Why	Even the best players need a good coach to improve
How	• Review Results vs. Objectives • Review/observe/analyze Activities • Review/observe/analyze Methodology • Determine "What Is" (Point A) and "What Should Be" (Point B) • Set performance improvement goals • Explore possible solutions (facilitate but insert best practices as needed) • Select and gain consensus on the best solutions • Create an Action Plan

As a coach, you should:

- Lead by questions to engage, foster involvement, and gain commitment
- Draw out and remind the rep of best practices from onboarding, ongoing training, previous experience, or previous coaching sessions.
- Discuss options, gain consensus on which to try, and create an action plan.

And then, as always:

Use an **Understanding Check** to validate the rep summary of the plan to ensure mutual understanding. In this case, it's best if your rep documents the Action Plan, which should include who will do what, to what level, by when – and what results are expected.

DO

In this stage, it's time to execute the plan. Give the rep room to try their plan and make mistakes and/or succeed.

As they execute, keep the door open for them to reach out for help before you are scheduled to meet again. You can help in preparing their first attempts, or to answer questions and offer advice.
Depending on the situation, you may want to observe or coach as requested or necessary, to assist in their action plan implementation. This is not a full-blown cycle back through Diagnose, Plan, Do, Review, but instead is assistance in implementing their current plans. While this seems like a segue into the Review stage, it's not.

In this case, the **Understanding Check** occurs when the rep executes the plan. The attempt to execute, as agreed, validates their understanding. This doesn't mean their execution will be flawless. For developmental coaching of skills, it's likely you will need to shape their behavior over time to reach mastery.

Review

In Review, you will meet with your rep at your regularly-scheduled time for planned coaching, or at another agreed-upon time, specifically to review the plan outcomes/results.

In this session, listen to details, ask questions, gather information, understand what happened, assess how close your rep's implementation was to the plan, and see what results they achieved. Depending on whether the rep improved their skills and results, determine whether to cycle again through Diagnose, Plan, Do Review, or consider other alternatives from the Conditions, Reasons and Solutions for Performance. If your rep achieved the desired results and closed the performance gap, you can return to ROAM to analyze other opportunities for improvement. If not, you can cycle back to the beginning of Diagnose, Plan, Do Review (or just back to Plan) for additional coaching.

In any case, verify communication with an **Understanding Check** to ensure mutual understanding about any additional plans or the path forward.

How to Implement a Cadence of Coaching to Develop Sales Mastery and Deliver Results

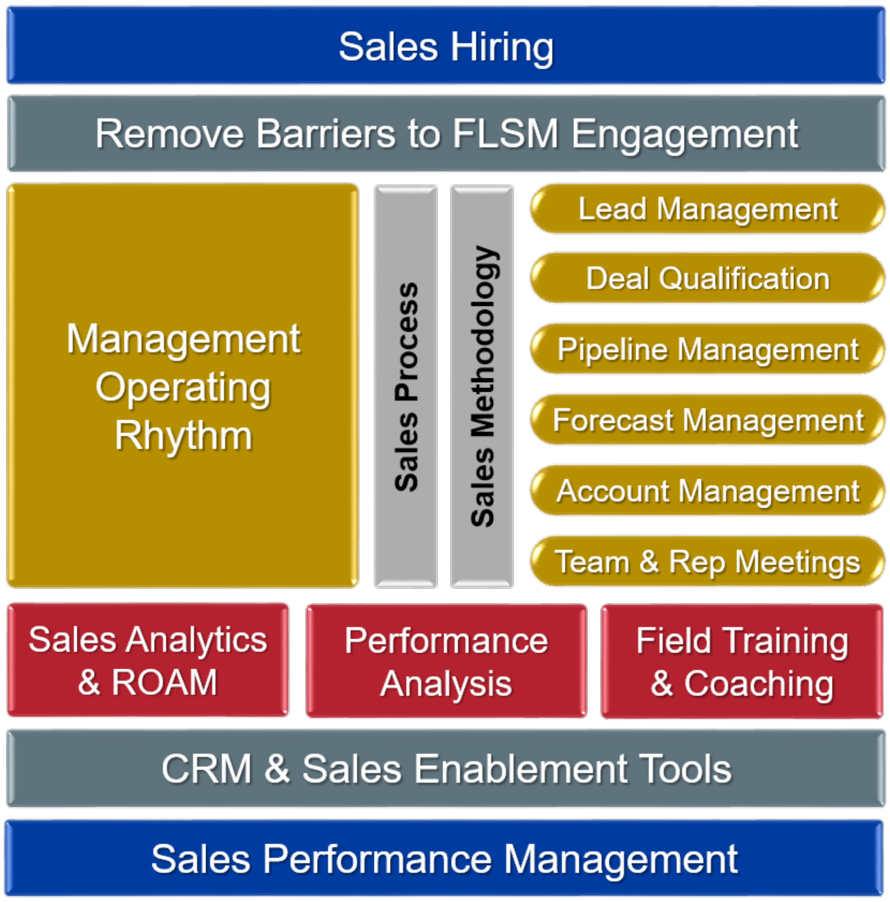
From our detailed descriptions of sales analytics, ROAM, field training and field coaching – which we did to be as clear as possible – You might assume the developmental coaching we've outlined will take a lot of ongoing time and effort.

Learning any new skill and gaining mastery does take time and effort upfront. But, the type of coaching we're recommending can be integrated into your busy day, once you have the tools (Pipeline Analysis dashboard) and learn the basic strategies (ROAM, performance analysis, and the training and coaching models).

There is nothing wrong with coaching opportunistically, in-the-moment. Especially given the proven benefits of coaching and considering all the types of coaching we mentioned in the introduction. As you've learned, though, we believe skills coaching should be orchestrated and purposeful.

Establishing a Sales Management System is one way to do that (and so much more).

Sales Management System



Getting into the cadence of a management operating rhythm brings many benefits. It creates a structure for how the business is run, fosters efficiency and effectiveness (especially for recurring meetings), provides consistency for employees and senior leadership alike, sets expectations for both you and your sales reps, and improves productivity. It also ensures that the most important things are receiving their deserved attention.

From a developmental coaching perspective, establishing this cadence ensures that, despite the whirlwind of daily business, individual skills coaching won't be forgotten or ignored. In the Sales Management System that we recommend, Sales Analytics, ROAM, Performance Analysis and Field Training and Coaching are built into the model.

Whatever operating rhythm you establish, or whatever elements you include in your sales management system, we recommend you include these three elements.

A Cadence of Coaching

By doing that, you'll have an opportunity to create a cadence of coaching to establish a culture of continuous improvement.

In addition to formal pipeline and forecast management meetings, and regular one-on-one meetings weekly with team members for problem-solving and opportunity updates, you should schedule ride along/call along time with each rep, monthly. These are specialized, developmental times where you can follow the practices outlined in this eBook, and help reps grow and improve their skills in areas that truly matter.

A Thought About Change Management

There's much we could say on this topic, from understanding individual sales rep's motivators to use as incentives to achieve action plan outcomes, to larger-scale organizational change management methods. We recognize the relevance and importance of purposeful change management and leadership, and you should, too. Due to the depth of the topic, change management is something that we will address in a separate eBook.

Summary and Next Steps

Now that you've gotten this far, you know the key takeaway we're trying to impart: adopting an effective coaching approach is critical to your success, your reps' success, and the growth and success of your company.

SALES COACHING EXCELLENCE IS THE PATH TO A BEST-IN-CLASS SALES FORCE

As a manager, armed with your knowledge of best practices, behavioral/skills coaching is possibly the single biggest lever you can pull to radically improve your team's sales results.

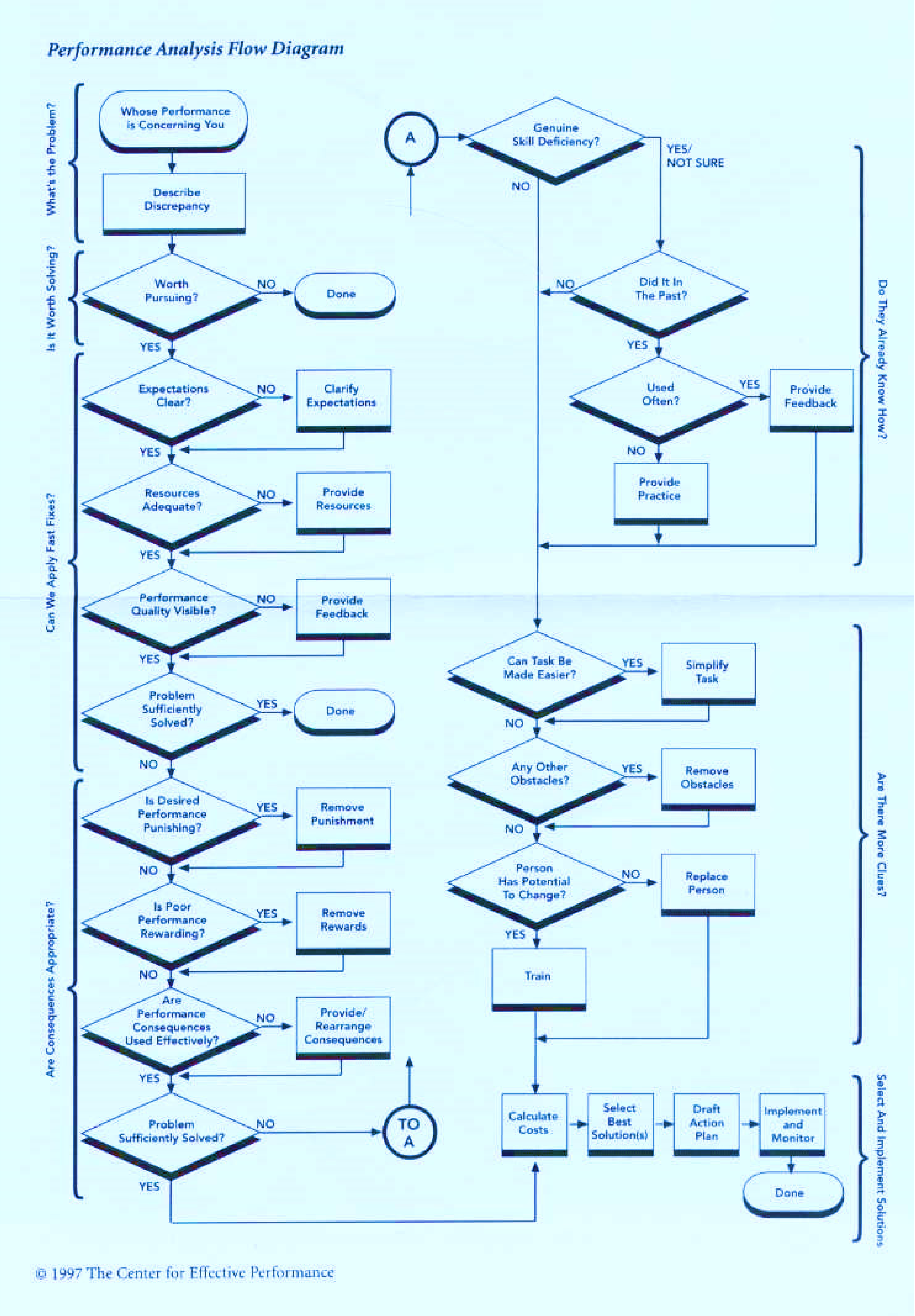
To maximize the effectiveness of your sales team, it's key to assure all reps are properly trained, frameworks have been established for ongoing coaching and development, and to follow through with a coach's mindset as you work with your reps. It won't always be easy, and it won't happen overnight, but now that you have the knowledge required to get started, it's very important to begin to use the techniques and models you learned in this eBook and apply them with your own team or teams.

If the whirlwind of daily work activity prevents you from succeeding at first, we urge you not to give up. Transitioning from managing and leading to layering on true behavioral coaching will be a reward well-worth the effort it takes to achieve. You won't regret the changes you'll make along the way, as you see the improvement in your reps, your team, and your joint results.

If all of this seems overwhelming, and you don't know where to start or how to make it stick, we've got your back. The team at Digital Transformation, Inc. has extensive experience working with sales teams of all shapes and sizes, and we've helped many organizations build their bottom line by getting the most out of their people. If you need support on your journey toward sales coaching excellence or with any part of your sales transformation, we're here to help.

Appendix

Mager & Pipe's Performance Analysis Flow Diagram



About the Author

Mike Kunkle is the Vice President of Sales Transformation Services for Digital Transformation, Inc., a division of Fast Lane. He's a respected sales transformation architect and an internationally-recognized sales training and sales enablement expert.

Mike spent 24 years as a corporate leader or consultant, helping companies drive dramatic revenue growth through best-in-class learning strategies and his proven-effective sales transformation methodologies. He consults, advises, writes, speaks, leads webinars, designs sales learning systems that get results, and guides clients through all aspects of their sales transformation.

Industry Recognition

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