Sales Coaching

Association for
Talent Development

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Intro

Effective sales are critical to the success of a business. To improve performance among sales representatives or to help attain sales goals, coaching is used frequently to help sales reps define their sales goals and create action plans to attain those goals.

According to the *2021 State of Sales Training* research report, 84 percent of survey respondents cited coaching as the most frequently used learning method. Previous research from ATD has shown that having a sales coaching program is associated with better sales performance.

Sales managers are often the coaches in sales departments, so support from the organization and training on how to coach is vital to a successful program. This e-book examines the ins and outs of sales coaching, how to get the most out of a one-on-one coaching session, and three keys to effective sales coaching.

What Is Sales Coaching?

By Mike Kunkle

At a high level, sales coaching is a formal developmental process where sales managers partner with reps to improve performance. Sales managers encourage their reps to take responsibility for their growth by helping them determine areas of development, create action plans, and take steps to improve their performance. Instead of telling the reps what to do, sales managers act as guides to help them uncover the best strategies to achieve their goals, which creates a development partnership. To build the most effective sales coaching development programs, managers must know what, how, and why to coach. It might seem odd to some, but sales coaching is comprised of field training, which differs from what a training department, HR, or a sales enablement function would provide.

If you want to develop a best-in-class sales force, your frontline sales managers need to:

- Analyze their sales reps' performance.
- Decide where to spend their limited coaching time to get the best results.
- Determine the best type of solution (such as training or coaching) and the right solution content:
    - Identify ways to help reps maximize performance in targeted areas.
    - Provide training to ensure reps have the skills they need to succeed.
- Guide reps to greater success with a coaching approach that's engaging and motivating.
- Establish a regular coaching cadence to help reps attain sales mastery and achieve the best results possible.

Using Metrics for Change

The goal is to use sales analytics to help managers determine where to spend their coaching time to have the biggest effect on their team's performance. When planning to work individually with a sales rep, most managers say something like, "Hey Ruth, I'm available to ride along with you on [date]. Where are you headed?" However, to make a more significant impact, the savviest managers will say something like, "Hey Ruth, based on our recent analysis, let's spend time together when you're working with prospects in [stage 2] moving toward [stage 3]. When can we schedule that?"

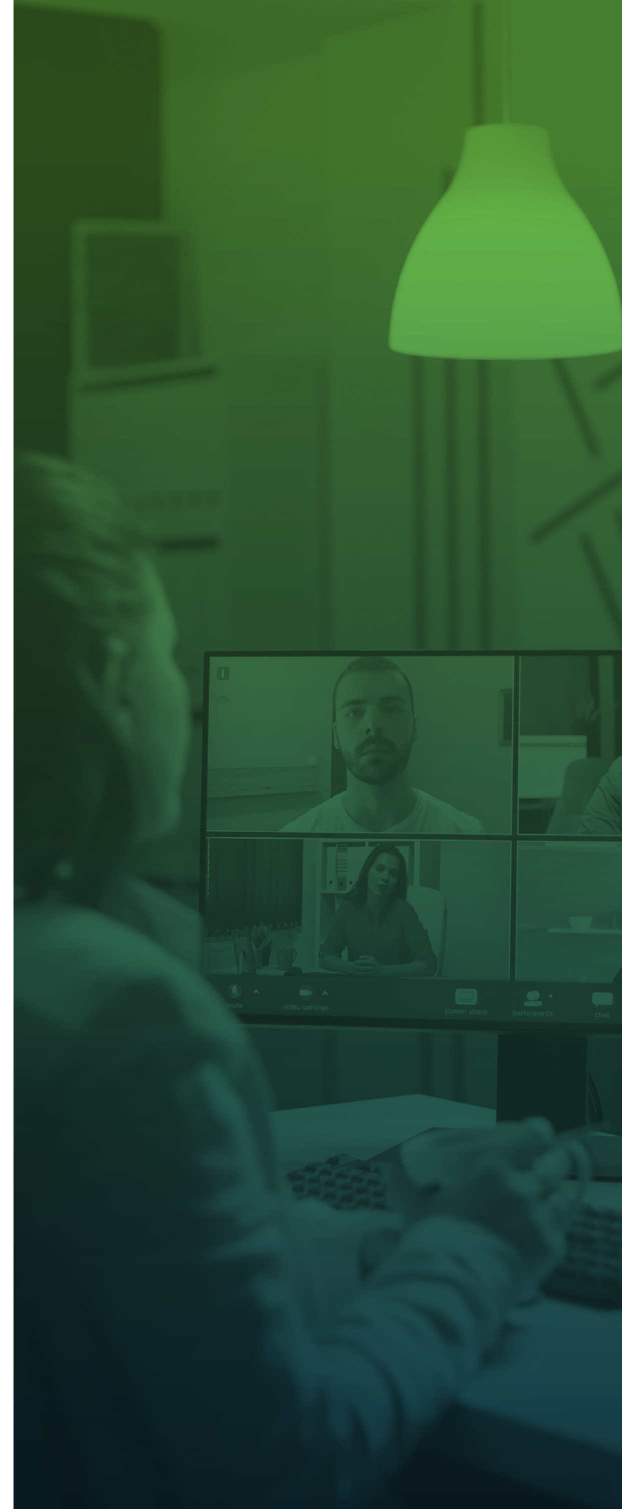
It's the metrics and analysis that managers do with their reps that allows them to target areas of development that will lead to the best-possible performance improvement.

There are multiple reports and dashboards that can support managers with this task. You probably have many in place already. Historical dashboards are great ways to track the sales process stages, the number of opportunities per stage over the period reviewed (usually two to three times the average sales cycle), and the conversion ratios between stages.

Suggestion: Group the sales force into anonymous buckets of top producers and average producers and compare their results to a specific manager's team (now named, rather than being anonymous), showing the team's average performance and the individual performance of each rep.

Opportunity Management: Sales Process Conversion

Sales Process Stages	1		2		3		4		5
Top Producer Avgs	100	50%	50	80%	40	75%	30	67%	20
Mid Producer Avgs	80	44%	35	63%	22	59%	13	54%	7
Your Team Avgs	70	43%	30	60%	18	72%	13	54%	7
Rep 1	50	40%	20	50%	10	70%	7	57%	4



As managers compare individual reps to their team averages and the other producers, they should be able to identify gaps quickly, which they can then explore more deeply using the methods outlined here. This report may require modifications based on context and nuance (that is, the unique business circumstances at your company), but you can figure that out with your leadership team and business analysts. Keep in mind that this is only one example and doesn't apply if you manage business development reps or strategic account managers.

It's the thought process that matters, and you can work to find ways to do this for all the roles on your team.

Activity and Methodology

Managers can use the Results vs. Objectives, Activities + Methodology (ROAM) model to analyze the targeted performance gaps and begin to hypothesize the root causes and possible solutions.

ROAM comprises these steps:

- **RO**: Compare results versus objectives (outcome gap) to determine where to focus. This is part of the review of sales metrics.
- **A**: Review or discuss the activities the rep is performing. This includes what they are doing, with whom, how often, and as applicable, when and where they're doing it.
- **M**: Review or discuss the sales methodology used for the buyer-facing activities. This is an examination of the quality or how well the activities are being performed.

ROAM
Results vs. **O**bjectives
Activities + **M**ethodology

- Compare **results** to **objectives** to determine gaps
- Analyze the **activities**
  - What, why, and how much or often (maybe when and where)
- Observe and assess the **methodology**
  - How (quality)

Skill Development and Behavioral Coaching

- Do they know **what** to do?
- Do they know **why** to do it?
- Do they know **how much** or **how often** to do it?
- **Can** they do it? (**how** or **skill**)
- **Will** they do it?
- Are they doing **enough** of it?
- Are they doing it **well enough**?

From their previous knowledge of the rep's behavior and current discussions, managers should be able to formulate a hypothesis of the performance problem, which they can then explore further.

Root Causes

As managers explore the A and M of ROAM, they should go beyond discussion, their current knowledge of the rep's activities, and the existing methodology used so they can observe their rep in action in targeted areas to acquire a fresh, new perspective. Observing the activities and sales methodology will help validate their hypotheses and identify the root-cause knowledge or skills gaps.

Solution Type and Content

Based on the reasons for nonperformance, managers can then determine the best solutions—the type of solution (training, coaching, or something else) and best-practice content that will close the gap. These key questions work at the simplest level, but another helpful tool is a Conditions, Reasons, and Solutions for Performance chart. This chart is based on Ferdinand Fournies's book *Why Employees Don't Do What They're Supposed to Do and What to Do About It* to explain causes for non-performance, including reasons outside training and coaching.

Performance Analysis and Solution Design

The 16 reasons employees don't do what they're supposed to, and what to do about it.

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

Counseling, managing consequences, changing something within the organization, or transferring or terminating an employee are out of scope for field training and sales coaching, but are options you can consider, when appropriate. Engage your HR manager, as needed.

Key Questions for Skill Development and Behavioral Coaching

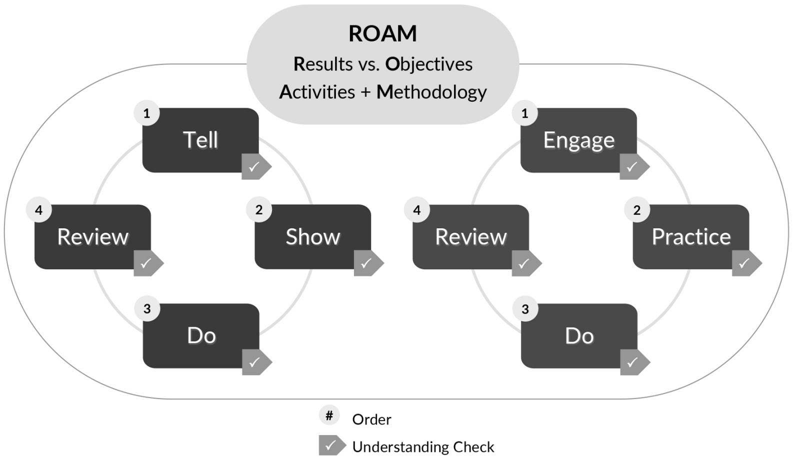
- Do they know **what** to do?
- Do they know **why** to do it?
- Do they know **how much** or **how often** to do it?
- **Can** they do it? (how or skill)
- **Will** they do it?
- Are they doing **enough** of it?
- Are they doing it **well enough?**

Field Training and Coaching

At this point, assuming the manager has uncovered a performance gap that can be addressed with field training or sales coaching, they can use these models to support their rep in achieving skill mastery and improving performance.

Using field training model:

- **Tell:** Instruction with a recap and understanding check
- **Show:** Demonstration with skills validation
- **Do:** Action plan with execution and tracking
- **Review:** Check ROAM and continue the train and coach loop, as needed



Using the sales coaching model:

- **Engage:** An engaging, facilitated discussion about what and how to improve
- **Practice:** Role-play practice with debriefs and feedback loops
- **Do:** Action plan with execution and tracking
- **Review:** Check ROAM and continue the train and coach loop, as needed

How to Conduct Field Training

You're ready for field training when you have:

- Conducted an analysis to know where you can have an impact
- Diagnosed the performance gaps by analyzing the activities and methodology compared to known best practices
- Determined what the rep needs to know how to do, why, and how it will close the gap by improving the activities and methodology

To do this, I offer the field training model with tell, show, do, and review, with the super-charger understanding check, which validates both communication and capability. This simple but powerful validation technique is significantly underutilized and critical to success.

This mode is neither new nor complicated; it just works. The magic of this method, however, is in the disciplined execution of the four steps.

First, *tell* the rep what to do. Keep in mind that when you do this, you are training, not coaching. Being direct is acceptable for training so that reps are clear on what to do, why to do it, and how. 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, use the understanding check to ask the rep to summarize what they think they are expected to do. Don't leave this stage until the rep can summarize it to your complete satisfaction.

Next, for skills-based learning, *show* them how it should be done, typically through role-playing. 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 along with a top producer whom you know will demonstrate the targeted skill properly, or use a video demonstration, if you have one. For expediency and effectiveness, have reps role-play in real time

with their manager. Then, in the understanding check, the rep will role-play the skill back to you. This validates that the rep not only understands it but can do it. It doesn't guarantee they will do it once they're on the job, but it does mean they can.

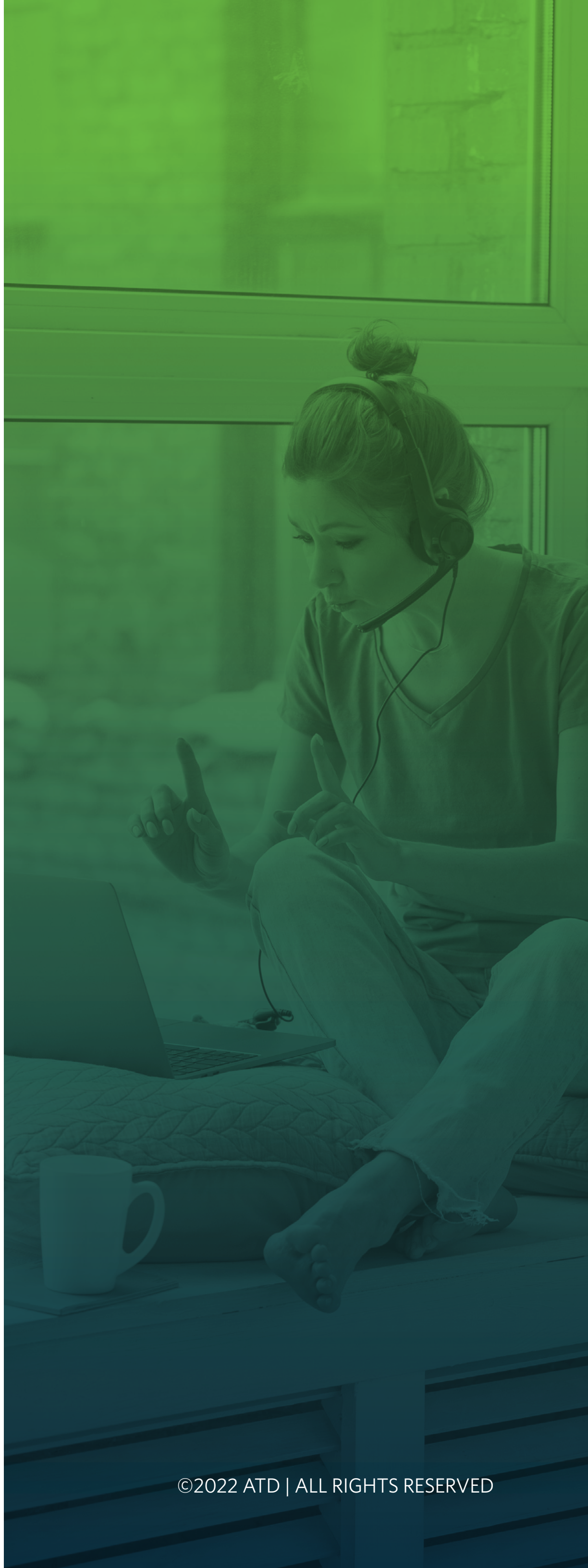
If you're not always able to do this step in person, you can use video and virtual coaching tools as well as live virtual role-play services, or even web conferencing software using webcams, to support practice and feedback.

In the "do" stage, the manager or a seasoned rep should demonstrate the skills live—in a real selling situation—on the phone or in person. Some skip this step and move directly to live application with the sales rep, but I recommend first showing the rep how to use the skills effectively in a less clinical, real-world setting where unexpected things happen.

In the understanding check for this stage, the manager observes the rep with a prospect or customer. This lets them assess whether the rep clearly understands expectations and validates that they can do it and will do it in live selling situations. It also allows managers to verify how well the reps can do it and coach them toward mastery.

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

Even if what's taught during field training is used by reps in the real world, it doesn't guarantee mastery. That's where the review stage comes in. After real-world observations, managers should meet with their reps to discuss and assess their performance together. This is still part of the overall training process because you are targeting a specific skill or set of skills that was just learned. This is where field training dovetails with coaching. You can also extend the review phase, as needed, with rolling review check-ins until the rep has mastered the specific skill you are teaching.



To recap, here's why the field training model of tell, show, do, and review is critical:

- It clarifies expectations for the rep and helps them develop the necessary skills to close their performance gaps.
- It is the ultimate excuse remover, because you've seen your rep demonstrate that they understand what to do and know how to do it, which fosters accountability.
- Your upfront investment reduces the time spent on these skills in the future. My advice is to do it right once, rather than ineffectively and repeatedly.

If a rep doesn't use the skills they've been taught after a field training cycle of tell, show, do, and review or doesn't do them well, their manager can:

- Coach to help the rep improve on what they know.
- Begin to explore other reasons for nonperformance using the Conditions, Reasons, and Solutions for Performance chart, and address them as needed.

How to Conduct Sales Coaching

In the first step, "engage," you'll involve the rep in a facilitated discussion about improvement possibilities. What do they need to improve, and how will you work together to accomplish that? If you're continuing from a previous training plan, your goal is already identified. If not, you'll need to start with (or may have just completed) a new diagnosis and plan.

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 are important when training, this process should be far more facilitative, collaborative, and engaging. The manager should act as a guide, keeping their rep involved, thinking, problem solving, actively participating, and, ultimately, owning the solution—in this case, what to improve and how to do it.

As a coach, a manager should:

- Lead by asking questions to engage, foster involvement, and gain commitment.
- Draw out and remind the rep of best practices from onboarding, ongoing training, or previous experience and coaching sessions.
- Provide exposure to top producers or their call and meeting recordings to introduce new ideas or best practices.

At the end of this step, your rep should have a clear path forward for improving the targeted skill and be able to summarize it for you with an understanding check.

In the second step of the model, "practice," it's time to hone the decided-upon target skills and prepare to implement what you discussed and agreed on in *engage.* This is very similar to the *show* step in the field training model, except that now, rather than you demonstrating new skills to them first, your rep is practicing first with you to further hone their current or newly acquired skills.

It's always acceptable to switch roles if you think another demonstration might help, but this is your rep's practice time. As always, you should debrief with their thoughts first on what went well and what they'd like to continue to improve, then add your feedback or advice. (Ask if you can provide feedback, at least for the first time.) Continue the practice, debrief, feedback loops until your rep can demonstrate an improved skill level to your satisfaction.

In the third step, "do," it's time for your rep to document and execute their action plan. Give the rep room to try their plan, make mistakes, learn, and then change it. As they execute the plan, make sure they know they can reach out for support before you are scheduled to meet again. You can help them prepare for their first attempts by answering questions and offering advice as needed. Depending on the situation, you may want to observe or coach to assist in their action plan implementation. However, this is not a full-blown cycle back through *diagnose, plan, do,* and *review*; it's a way to provide support as they implement the plan. While this seems like a segue into the review stage, it's not. In this step, the understanding check occurs when

the rep executes the plan as agreed because the execution validates their understanding. But remember, this doesn't mean it will be flawless—this is developmental coaching, so you'll likely need to help them change their behavior incrementally before they reach mastery.

In "review," the final step, you will meet with your rep for planned coaching, specifically to review the plan outcomes and results. In this session, listen to details, ask questions, gather information to understand what happened, assess how closely your rep's implementation was aligned to the plan, and see what results they achieved. Based on how the rep improved their skills and results, determine whether you need to cycle again through diagnose, plan, do, and review, or at least through ROAM, and whether you need to consider alternatives from the Conditions, Reasons, and Solutions for Performance chart. Then, verify communication with an understanding check to ensure mutual understanding about any additional plans or the path forward.

How to Conduct Individual Coaching Sessions

Start by discussing why you are spending time together, so that it's clear to both parties. You do this by aligning the purpose, plan, value, and timing for the session:

- Ensure roles are understood. The rep owns their development. You, as the coach, are the guide.
- Confirm that your intentions are understood. Your aim should be to help your sales rep achieve their goals and reach their highest potential.
- Build trust. If this process is new for your rep, it may take some time to build trust in the approach.

Lead the Performance Analysis Discussion

In the second step, you'll:

- Discuss how you and the rep will prepare for the meeting and review any sales analytics together (sales metrics or sales competency diagnostics).
- Align on expectations and issues to be addressed (the competency gap to be closed, including the "what and why").

Explore Solutions and Options, and Agree on the Best Solution

In the third step, you'll:

- Schedule field observation or further diagnostics as needed to confirm any hypotheses you've reached together.
- When you have all the data you need or can obtain, consider solution options and select the best path forward. Remember to lead and facilitate, rather than direct. If the rep gets stuck, you can give suggestions, but it should be a discussion.
- Deliver or schedule field training or sales coaching sessions, as needed, to support skill development and performance improvement.

Develop and Implement an Action Plan

In this step, you'll want to include who will do what, how, and by when. In addition, you'll want to:

- Consider your employee's motivators to maximize the chance of the plan's success.
- Follow up and continue the loop through diagnose, plan, do, and review until the performance objective is achieved.
- Use SLED to run the individual coaching sessions.

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Source: Chapter 7 of *Building Blocks of Sales Enablement* (ATD Press)

Getting More From One-on-One Sales Coaching Sessions

By Justin Zappulla

In addition to training, sales coaching is one of the most important investments an organization can make in its sales team. While group coaching is important and expedient, the best results often stem from one-on-one coaching. Unfortunately, for many, these sessions can degenerate into simple number crunching. Of course, the metrics are important, and managers should stress the key performance indicators (KPIs), but effective coaching must always get beyond statistics. For the best results, coaching should provide an opportunity for teamwork, collaboration, and mentoring. Here are some ways managers can get more out of their one-on-one sales coaching sessions.

Match Your Sales Cycle

For many organizations, monthly meetings make sense. Of course, you want to give reps freedom, but the frequency of your coaching sessions should match your sales cycle. Reps with longer cycles, such as those who deal with enterprise clients, can benefit from the flexibility of a monthly meeting. However, sales development reps (SDRs) and those in higher volume sales could be better served by weekly or biweekly meetings. As a rule, provide time for things to happen but be vigilant enough to catch issues before they become problems.

Be Consistent

No matter how often you meet, keep a consistent schedule. Coaching should never feel haphazard, random, or hurried. If you treat it this way, your reps will, too. Stress its importance by sticking to a schedule.

Prepare a Rep Agenda

While managers should set an agenda for their coaching sessions, it's equally important to let your reps also prepare. Like a good sales meeting, the best coaching sessions are interactive. In addition to increased buy-in, giving reps a stake in the agenda selection can reveal issues managers might have missed or didn't think were important.

Offer Additional Time

No matter the frequency of your coaching sessions, you should always set a definite time limit. This helps reps keep their focus. Provide the opportunity to let your reps speak more, and ask any questions that may arise from your tips and suggestions.

Listen More

Just as the best sales pros listen more and speak less, the same is true of sales coaches. While the tendency may be for coaches to dominate by sticking to a schedule and making critiques, don't let an agenda supersede performance. By letting your reps speak more, you will gain insight into their thinking and better understand their behavior. This provides a greater opportunity to praise their strengths and correct their weaknesses.

Look Forward, Not Back

When coaching, it can be easy to focus only on past performance. While some reflection is necessary and part of coaching must be pointing out mistakes and offering suggestions, coaching will be much more productive when you look forward to what sales reps can do instead of just looking back.

Focus Less on Metrics, More on Action

Another trap for coaches is getting so caught up in numbers you neglect the human element. While the numbers are key to gauging performance, the focus of coaching should always be on activity. Instead of coming up with more goals to reach, effective one-on-one coaching should stress the things reps need to do, the actions they should take, and the behaviors they need to employ to get the most from their efforts.

Like any routine, it can be easy to let sales coaching slide or become perfunctory. After all, you're looking at the same key performance indicators (KPIs), time after time, for each of your sales reps. Often, it can feel like you're repeatedly saying the same things. However, sales managers must remember that coaching is more than numbers. Your one-on-one sessions are an opportunity to build relationships with your reps, understand each other, and guide them to greater success. Just as salespeople take pride in building relationships and providing solutions, for managers, one-on-one coaching is a reminder that sales is about helping others, whether they're our clients or our reps.

Justin Zappulla *brings more than 20 years' sales and sales leadership experience as managing partner of Janek Performance Group. Justin's career has been highlighted by remarkable performance, and he is considered one of the top authorities and thought leaders in sales training, sales consulting, and sales performance improvement. Justin co-authored the highly acclaimed sales book* Critical Selling *and was a key contributor to the sales book* Mastering the World of Selling.

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3 Keys to Effective Sales Coaching

By Michelle Vazzana

Truly effective sales coaching must align with the real-world priorities of your sales managers. So, what is the top priority for sales managers? Hitting their sales targets, of course!

How do you ensure that the coaching training you provide your sales managers aligns with what matters most? Let's look at three key skills that are needed to successfully connect the dots between sales coaching and meeting revenue targets.

Identify the Selling Activities That Matter Most

Before a sales manager can become an effective coach, they need to become an expert at answering the question, "What should my sellers be doing to meet quota?" High-impact sales activities lead to the accomplishment of specific sales objectives, which ultimately leads to the attainment of desired business results—yet none of these components are addressed in typical coaching models. The first order of business is for sales managers to learn how to set the right direction for seller effort, which means defining which activities have the highest impact on sales results. This, in turn, influences the agenda and discussion topics for sales coaching conversations. Coaching then becomes a sales manager's tool for helping sellers prioritize their efforts around the activities that most closely align with meeting quotas.

Point Sales Coaching at Those Activities

Selling is not a one-size-fits-all affair. Neither is sales coaching. Managers must be trained to select the right type of coaching based on the key activities of the sellers they manage. If sellers must obtain more new accounts to meet a quota, the coaching should target account prioritization and prospecting. However, if sellers must grow existing accounts, sales coaching should target up-selling and cross-selling activities within existing accounts. The more the coaching conversation is tailored to the seller activities that lead to a quota, the more likely a

seller is to reach their goal. Without this clarity of direction, the sales coaching conversation may revolve around a host of topics that may seem relevant but have little impact on actual seller performance.

Establish a Formal Coaching Rhythm

What sales managers and sellers discuss during a sales coaching session is important, but coaching will not happen unless sales managers are trained to create a rhythm that works for both busy sales managers and sellers. A sales management rhythm must be based on a holistic view of the priorities of sales managers; then, sales leaders, trainers, and sales managers can work together to develop a framework and management rhythm that allots sufficient sales coaching attention to the sellers. An effective sales management rhythm prioritizes coaching effort, leaving room for coaching that is relevant and actionable within the manager's real world. Dedicating time to have a meaningful and deep conversation about key activities is a common practice of high-performing managers, but more is not always better when it comes to sales coaching. One hour of highly effective sales coaching per month will often yield better results than two or three hours of ad-hoc directives given in 10-minute increments. Focus matters.

When you add these three skills to your sales coaching training program, your sales managers will be better equipped to successfully connect the dots between how effective sales coaching leads to higher sales performance and bigger bottom-line results. It usually doesn't take long for sales managers to see that, when properly done, sales coaching is their best tool for helping sellers meet quotas.

***Michelle Vazzana** is CEO at Vantage Point Performance, a global sales management training and development firm. Vazzana is also co-author of* Cracking the Sales Management Code*. She is a sought-after speaker on the topic of sales management and leadership and has more than 28 years of successful sales and management experience.*

Reprinted from *February 6, 2018 ATD blog*

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