

Coaching for Sales Success

All sales professionals need coaching

Your Coaching Package includes this reading so that we will be able to maximize our time during your scheduled coaching conversation. Please print and read this article, take notes, and have it available for reference during our coaching conversation.

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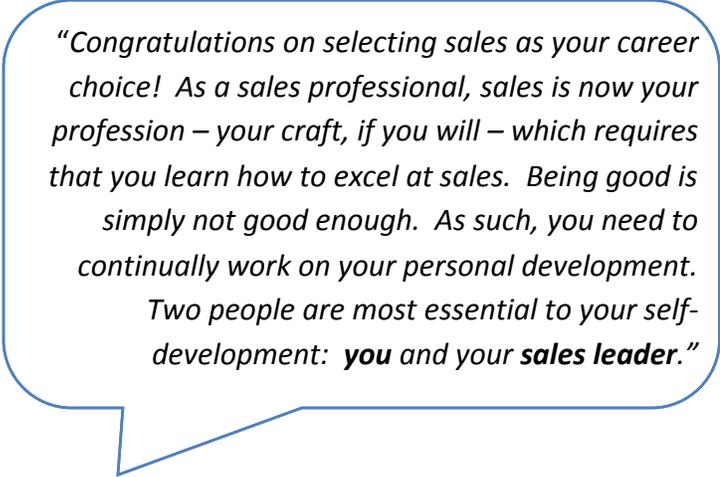
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Coaching for Sales Success

All Sales Professionals Need Coaching

As a professional sales coach and sales trainer, when I work with newer salespeople, I often say the following welcoming message:



*“Congratulations on selecting sales as your career choice! As a sales professional, sales is now your profession – your craft, if you will – which requires that you learn how to excel at sales. Being good is simply not good enough. As such, you need to continually work on your personal development. Two people are most essential to your self-development: **you** and your **sales leader.**”*

Numerous studies support this point, namely that the single most important person who can impact a sales professional’s performance, is his/her immediate manager. Therefore, **coaching by a sales manager is the most critical component of a manager’s job.** If you want your salespeople to excel, and sales results to improve, coaching is essential for sales success.

What about your experienced sales professionals? Although the above example referenced newer salespeople, there are several reasons why a sales manager should spend as much time – or more time – coaching his/her experienced sellers. Consider these two reasons:

Your experienced salespeople are usually assigned to larger, more strategic accounts. The skills and competencies needed to manage key accounts are different than the more basic selling skills needed by newer sellers at smaller accounts. **If you don’t coach and develop your experienced sales professionals accordingly, you won’t grow your business at key accounts and may be at risk of losing business.**

Experienced professionals in many fields – engineers, doctors, technicians, professors, and so on – regularly upgrade their skills and knowledge. This is equally applicable to sales professionals. An experienced sales professional who uses the same selling methodologies as 20 years ago is not going to do well in today’s world. **Keeping both the method and the message fresh will keep those experienced sales professionals from falling into a rut.**

So, simply put — ALL sales professionals need coaching to stay at the top of their game. It seems like common sense yet many managers don’t spend enough time, or any time, on coaching. They often forget about keeping the coaching conversations going with everyone on the sales team, including their experienced sales professionals.

So, Why Don't All Sales Managers Spend Time Coaching their Sales Team?

As a former sales professional, sales manager, and VP of Sales, I've seen firsthand the tangible benefits of sales coaching done well. Coaching effectively, however, can be a challenge. For instance, consider these two observations from [Sales Training And Results, Inc. \(STAR\)](#) consultants:

Observation #1. We've worked with thousands of sales managers over the past 25 years. During our [Coaching for Sales Success workshop](#), sales managers often lament "I know that my salespeople would benefit from coaching by me, but I'm too busy." And we reply, "Wow! Too busy to do what is considered to be the most essential part of your job as a sales manager? Free up some time to coach your sales team. We're sure that you'll say it was time well spent."

Observation #2. During [One-on-One Coaching](#) assignments with clients, our consultants see just how valuable sales coaching can be. We ALWAYS observe a significant improvement in the other person's selling behavior and results. The sales professional's confidence level increases, which helps to sustain the "new and improved" behaviors long term.

Research demonstrates high value in sales coaching. A study by the Sales Excellence Council showed an increase of 17% in performance for those salespeople who were coached more than three hours per month, in comparison to those who were coached fewer than two hours per month.*

*Sales Executive Council, 2007, *World Class Sales Coaching*, retrieved from <file:///C:/Users/Work/Downloads/SEC%20First-line%20Manager%20Coaching%20Program.pdf>

The contradictory message from the two observations and research cited above seems to be – **Sales coaching improves sales performance, confidence, and results, yet many sales managers don't coach well or at all.** The focus of this article is how to do it well and efficiently. It really doesn't take long to prepare and do a coaching session with your individual salespeople and collective sales team. It is essentially a matter of establishing a priority to get into a regular coaching routine.

Four Important Questions that Will Lead to Coaching Success

We've already stated that ALL sales professionals need sales coaching, so this article will examine four important questions that will help sales managers improve coaching skills.

What characterizes effective coaches?

What is the most important step in the coaching process?

What process should you follow when leading a coaching conversation?

How should you vary your coaching style for different salespeople and situations?

Question #1 — What Characterizes Effective Coaches?

What characterizes effective coaches?

Think about a time in your life when you were coached by someone else. For many of you, you likely will think back to one or more people who coached you during youth sports. Or, perhaps you were gifted artistically or musically. Or, perhaps, you were fortunate enough to have a mentor at your current or former job.

Have a specific coach in mind and then answer this question. *What did that coach do that made him/her so effective at coaching you?* Write down one or more answers in the box at right:

We ask a similar question in our workshops and often get answers such as this: *“This coach was a ...motivator, teacher, and disciplinarian, led by example, team-builder, and listener.”*

The key point is that all of the attributes shown above are positive and lead toward improved performance. A sales leader who motivates the sales team is doing a good thing. A sales leader who teaches individual salespeople how to do something better, such as how to handle objections, is doing a good thing. You get the point.

Yet, for some reason, some sales managers mistakenly think that coaching is centered on only fixing poor performance.

What did that coach do that made him/her so effective at coaching you?

You will want to set the tone with your salespeople that coaching is positive. **Coaching is a good thing for professionals in all fields.** Look at all of the professional athletes who hire personal coaches. These athletes already excel at their particular sport yet realize that they cannot get to the next level without the help of a coach. It is the exception, not the rule, to find a professional athlete who doesn't have a personal coach.

Your salespeople will benefit from coaching just like professional athletes do. A well-coached salesperson is more likely to improve their sales skills *and* have increased motivation to strive for a higher level of achievement. That is why we call this article *Coaching for Sales Success*.

The sales leader is the best person to do the coaching because he/she can work long term and regularly with each salesperson. To use a sports analogy: one golf lesson will probably mess up your golf game, but a series of lessons with the same coach are likely to get you to the next level.

Question #2 — What is the Most Important Step in the Coaching Process?

What is the most important step in the coaching process?

Although the next section deals with the overall coaching process, in this section we're highlighting the most important step in the coaching process for the simple reason that, if you don't do this initial step well, the rest of the coaching process falls apart. **The most important step in the coaching process is for the sales manager to set clear expectations with each salesperson.**

Let's explore why setting expectations is so crucial, and also provide some advice on how to set and mutually agree on expectations with each salesperson. Ask yourself this question: Why doesn't a particular salesperson do what the sales manager expects him or her to do? In our experience, **the #1 reason why a salesperson doesn't do what the manager expects is because the manager's expectations were not clear.**

This may sound obvious but it isn't. Before embarking on an in-depth coaching conversation with each salesperson, if you feel that a seller isn't doing what you expect, you need to ask yourself: **Are my expectations clear?** If not, have a conversation with the salesperson about expectations. You may find that the salesperson then does what you want him/her to do, and no further coaching on that topic is required. Very efficient!

Three tips for having a successful coaching conversation that communicates expectations:

1. **Limit yourself to one or two expectations at a time.** Otherwise, if you coach the salesperson on too many things, you end up diluting the conversation and demotivating the salesperson.
2. **Expectations fall into two categories, so select the type of expectation that is most relevant for each individual salesperson.**

Standard expectations are something that you expect everyone on your sales team to do. **Individual expectations** refer to something unique to that individual salesperson.
3. **Focus both on results-based expectations and activity-based expectations.** "I want you to spend more time prospecting for new business" is an activity-based expectation. But, what is the expected result of making these extra sales calls? It is better to use a results-based expectation to link the desired results and the activity (or effort) that is likely to be required to meet the expectation.

Standard Expectations:

"I expect everyone on the sales team to focus on selling New Product/Service A for the upcoming 6 months."

Individual Expectations:

"Because you will be taking on responsibility next year for some larger accounts, I need you to improve your ability at key account management, specifically in two areas: (1) presenting effectively to higher-level decision makers; and (2) negotiation skills."

Results-Based and Activity-Based Expectations:

"I expect you to generate 20% or greater in sales volume growth in new business by the end of the year. To do this will likely mean that you need to spend one selling day per week on new business development."

Question #3 — What Process Should You Follow When Leading a Coaching Conversation?

What process should you follow when leading a coaching conversation?

STAR has developed a coaching process to help managers plan and conduct coaching sessions in a time-efficient manner. Let’s highlight a few important points:

A coaching conversation is analogous to a sales call. Notably, when you “open” the coaching conversation, spend the appropriate amount of time on rapport building. Put the salesperson at ease so that he/she understands that this is a coaching conversation, NOT a performance appraisal. Remember that coaching is a desirable thing.

Continuing with the analogy of coaching-is-similar-to-a-sales-call, the coaching conversation should be a dialogue! **The most common mistake that we see managers make is to talk too much during a coaching conversation.** Ask questions! Solicit the salesperson’s point of view and suggestions.

Just as an effective sales call ends with an action or next step, the coaching conversation must conclude with an action

plan that the salesperson buys into. **Tip! Have the salesperson summarize the action plan.** You can often tell by how he/she summarizes the conversation if there is agreement/buy-in or not.

The best sales professionals follow up after each sales call. **Coaches should follow up in the near future** to signal two important things: first, our coaching conversation was important and, second, that you are monitoring to see if the salesperson is doing what was agreed to during the action plan.

The coaching conversations shouldn’t sound too formal. **In fact, keeping the coaching conversation informal is effective.** Weekly update conversations can and should have coaching topics interspersed seamlessly. The conversational manner should feel natural, rather than formal, forced or awkward.

The Coaching conversation — 8 Step Coaching Process

Getting Started	1. Put the salesperson at ease. Connect by relating, opening the dialogue.
	2. Define the situation, notably to briefly cite: <ul style="list-style-type: none"> - one or two areas for discussion - your expectations for performance - salesperson’s actual performance vs. expectations
The Dialogue	3. Clarify the issues and ask relevant questions. For example: “What would you like to improve or learn about key account management?” <i>Tip! Ask first — and listen! Ask follow up questions.</i>
	4. Cite one or more positives if appropriate. Genuine praise helps to reinforce behavior that you want the salesperson to continue to do well.
	5. Demonstrate support, notably to offer and ask about resources that would support the salesperson’s effort to improve.
The Resolution	6. Agree mutually on an action plan, including when you will meet again.
	7. Have the salesperson summarize.
	8. End on a positive note and commit to providing feedback.

Question #4 — How Should You Vary your Coaching Style for Different Salespeople and Situations?

How should you vary your coaching style for different salespeople and situations?

Let's call the STAR coaching process in the prior section the **what** of coaching. The 8 steps in the coaching process are what you should do when coaching your salespeople.

Equally important, but often overlooked, is the coaching style that you use. Let's call that the **how** of coaching. There is no ideal or universal style for coaching salespeople. The most successful coaches vary their coaching style

to fit different people and coaching situations.

There are times when a sales manager should be directing and teaching a salesperson, at other times offering support and motivation, and other times taking a sterner approach if there is a performance problem or a difficult employee.

Sale managers tend to agree with the concept of varying their coaching style. Yet, we've seen in our workshops that most managers tend to use their same "natural" coaching style with everyone. That is why we'll explore in this section how to vary your coaching style. **You will improve the outcome of your coaching conversations when you use the appropriate style for each person and situation.**

Let's begin by assessing the factors that determine which coaching style is most appropriate. One criteria is the experience level of the salesperson. Most sales managers say *"I will tell a new salesperson how to do*

something and provide more examples and reasons than I would do with an experienced salesperson. I don't want to make the mistake of making my experienced sellers feel as if I am micro-managing them." There are certainly lots of sales coaching situations where you will treat a new salesperson differently than a more experienced salesperson.

However, don't assume that experience level is the only criteria or the best criteria. There are times when a newer salesperson may be more competent or receptive than an experienced seller. For example, imagine that you are running a sales meeting with your sales team, and one of your agenda items is how to use LinkedIn to network and generate new leads. This may be one example where you would likely need to spend much more coaching time with your experienced salespeople and little, if any, coaching time with your newer salespeople.

The best way to diagnose which coaching style to use is to assess the competence and motivation levels of each salesperson for the particular expectation or topic of the coaching conversation.

For competency issues, your coaching style needs to be mostly oriented toward a teaching, demonstrating, or explaining approach. By contrast, some salespeople are competent to perform a sales task but aren't motivated to do it. When you need to improve the motivation of the salesperson your coaching style should be more oriented to a dialogue with a supportive and personalized approach, with the dual intention of both motivating and building the confidence level of the salesperson.

Four Coaching Quadrants to Help You Select the Best Coaching Style



Key Points

- **Your long term goal is to develop the capabilities of each salesperson to migrate to Q1 for various sales tasks and skills**, so that each person is highly competent and highly motivated to do what you want them to do. This is the ultimate long term goal of your coaching conversations with each person.
- **Most of your salespeople are likely to be in Q2 or Q3 for specific selling tasks and skills.** Your coaching style needs to be adjusted accordingly because competence-building coaching sessions are different than motivation-building conversations.
- Hopefully, you don't have many or any salespeople in Q4. **If a salesperson is in Q4 for a particular skill or task, you need to address it.** Some sales managers avoid these conversations. Don't do this because your legacy is the salespeople that you leave behind for the next sales manager.
- Avoid one mistake that sales managers often make when they first learn the concept of coaching styles. **Do NOT label a salesperson as a Q1 or a Q2 or a Q3 or a Q4 for everything.** Salespeople vary in their competence and motivation for different tasks and skills. For example, when I managed my first sales team many years ago, one of my experienced salespeople was a Q1 as a product expert but a Q3 in new business development. This illustrates why you need to use *different coaching styles* with the *same* salesperson. This is another reason why you need to vary your coaching style.

Each coaching quadrant warrants a slightly varied coaching style. Listed below are some specific examples and advice when coaching salespeople in each of the four Coaching Quadrants.

Q1: Best Case (highly competent, highly motivated salesperson)

When a salesperson is in this quadrant, it doesn't necessarily mean that you stop coaching that person. One characteristic of top performers is their innate desire to improve. If you are fortunate to have someone in this category, ask him or her "What assistance or support do you need from me?" An additional tip: if a salesperson is in Q1 for a specific task/skill, **consider using this person as a mentor for your other salespeople.**

Q1
High
Competence
High
Motivation

Q2
Low
Competence
High
Motivation

Q2: Competence Quadrant (low competence, but highly motivated)

Many sales managers say that this is the easiest quadrant for coaching. The sales manager can focus on appropriate skill-building activities, such as: 1-on-1 role play; going on a joint sales call during which the salesperson observes the manager using the skill-to-be-developed; sending the salesperson to a workshop; assigning a Q1 sales peer as a mentor for this salesperson. Because the salesperson is motivated to improve, there is little or no resistance to the coaching suggestions.

Q3: Motivation Quadrant (highly competent, but low motivation level)

Many sales managers say that Q3 coaching is far more difficult than Q2 coaching situations. In other words, a manager prefers to coach someone with a competence issue than a motivation issue. We wouldn't say that Q3 situations are necessarily more difficult, although this can be true, but the coaching conversations for motivation issues need to be done differently than coaching conversations for competence issues. If a salesperson is in Q3 for a particular task or skill, your coaching style needs to be inquisitive and supportive. Since each salesperson is likely to be motivated by different things, you must ask questions to learn about the underlying issues. Then, you can offer the appropriate motivator.

Q3
High
Competence
Low
Motivation

Q4
Low
Competence
Low
Motivation

Q4: Worst Case (low competence, low motivation)

Don't automatically give up on a salesperson in this quadrant. Remember that change is a process. Coach the person first and try to improve the situation. Because you are dealing with both competence and motivation issues, we recommend that you focus on the most pressing need first. For example, if you feel that competence needs to be addressed first, you may find that the motivation issue goes away as the salesperson's competence increases.

One other observation: if you find yourself devoting an excessive amount of coaching time to this person, you may have the wrong person in the sales role and need to redeploy him/her. Don't spend an excessive amount of time coaching poor performers. Your total coaching time is limited, and you should not be spending all of it on the worst salespeople.

“I’m too Busy to Coach”

We want to conclude this article with one final piece of advice: Start using your sales meetings as coaching opportunities for your entire sales team.

Many managers say that they are “too busy” to coach their salespeople. Your weekly or monthly sales meetings provide an **efficient opportunity on a regular basis to conduct short skill improvement sessions.**

We started this article by saying that **all sales professionals need coaching.** All of your salespeople are at the sales meeting so you have a captive audience.

The most critical step in the coaching process is to clearly set expectations. A sales meeting allows you to **communicate expectations to everyone at once, presenting a clear and consistent message.**

Salespeople learn best from watching how their peers handle a situation. Try leading a skill-building session at a sales meeting on handling a common objection or presenting the benefits for a new product.

Ask one of your salespeople to lead a skills session at your next sales meeting. If you have a Q1 salesperson (high competence, high motivation) for a particular skill, have him/her lead this portion of the sales meeting. In essence the Q1 salesperson acts as a mentor to the entire sales team rather than just one salesperson.

Coaching by you means that individual salespeople will upgrade their skills and your collective sales team will improve their sales results. **Do it well, and do it often, because your salespeople are the legacy that you leave behind for the next sales manager.** What do you want your legacy to be? It is up to you.