FORCEMANAGER

How To Become an Exceptional Sales Coach

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As a sales manager your primary role is to get the most out of each member of your team. While there are a few ways to go about this - equipping your team with new sales technology and refining sales processes are two that come to mind - by far the most effective activity managers can leverage to affect sales performance is **coaching**.

That's because sales managers can not achieve their objectives alone - they need the help and support of the team around them.

With it being the highest leveraging activity available you would expect it, therefore, to be widely practiced and implemented across sales teams industry-wide.

However, when asked *"how frequently do you coach your sales team?"* in a study[1] conducted by David S. Brock, over **60%** of the interviewed managers answered just once per quarter or less.

That is astounding considering the key role coaching plays in a team's performance:

✓ Coaching develops salespeople's skills and capabilities to drive better performance in their day-to-day activities.

✓ It's an extremely powerful method for attacking and re-addressing behaviour issues affecting both individual and team performance

✓ It empowers your team to make their own decisions.

For this reason, we decided to put together a comprehensive guide to help you identify which of your salespeople's skills need improving, how to build a coaching plan that targets them and the most effective techniques in delivering feedback and measuring individual performance.

Enjoy!

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[1] *David A. Brock (2016) Sales Manager Survival Guide: Lessons from Sales' Front Lines*

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Understanding the difference between sales training and coaching

1

Well first off, is there actually a difference between the two? Are they not just two synonyms for the same exact concept?

While the two do maintain a very tight relationship they are and should always be identified as two **separate** entities.

Coaching generally focuses on real life situations and behaviours whereas training simulates hypothetical scenarios between reps and clients.

Training is extremely important in the professional development of a field sales rep; inviting a specialist in for a set of group sessions improves specific skill development such as presentation delivery or body language when speaking with a client. It can also be used to build knowledge around new product ranges, sales tools and CRM usage.

However, a sales trainer is **not** a manager. They do not see the reps work on a day-to-day basis. Yet many managers delegate the responsibility of coaching to trainers, believing that a few days of skill-based development will correct any deficiencies in a sales rep's repertoire.

But training can't monitor a rep's progress over a set period of time. It can not sit down with them and execute a coaching plan based on a series of conversations with the sales manager, which is why good sales teams strive for a perfect blend of both coaching **AND** training.

> **Coaching generally focuses on real life situations and behaviours whereas training simulates hypothetical scenarios between reps and clients**

Using data to identify skills that need improving

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One of the biggest problems facing sales managers is deciding exactly which of their salespeople's skills need improving.

Is it cold calling or email outreach? Is it their presentation skills? Their ability to overcome clients objections during a primary visit?

Just how do you decide?

The good news is a decision can be made following a fairly straightforward, two-step process:

1. Measuring the performance of your field reps against a related **sales objective** they have been set.

2. Identifying the appropriate **skill sets** required to complete those objectives

Let's look at an example.

Imagine your target business result for Q2 is to increase revenue by 10%. The best way to achieve this, you decide, is to increase customer acquisition rates by around 5% and for that to be done each of your sales reps will have to **increase sales visits** to prospective clients by 20%. See figure 1.1

Increase
REVENUE
10%

Increase
CUSTOMERS
5%

Increase
SALES VISITS
20%

Figure 1.1

Once you have assigned your salespeople a quantifiable goal **(number of sales visits)** related to a specific business objective **(increase in customers)** you need to track these two metrics over a period of time.

This can be done over a number of weeks, months or even by quarter; it really depends on the length of your sales cycle. A shorter sales cycle will require more frequent metric analysis than a longer sales cycle, for example.

To track these metrics, you can set up a custom sales manager report within your CRM. This will allow you to build up enough data to detect any weak areas in your sales rep's performance.
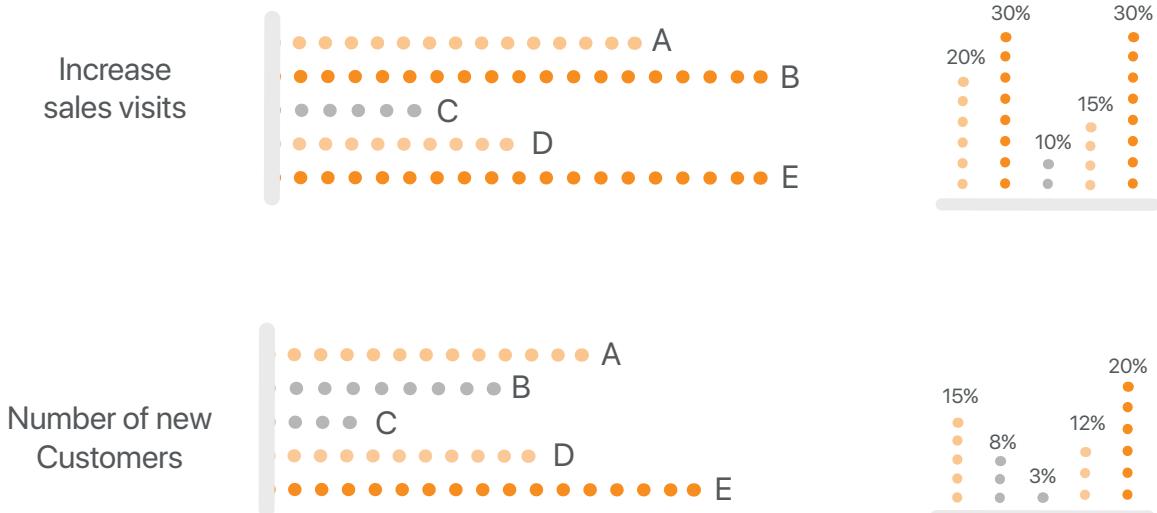
Individual Sales Rep Performance Q3

Figure 1.2

Take a quick look at figure 1.2. You'll see the performance levels of 5 field sales reps (A-E) measured against our two key metrics; our business objective (increase the number of new customers) and sales goal (increase in the number of sales visits).

Each line represents a single salesperson and indicates who are the top, mediocre and poorest performers.

Let's take a look at **sales rep C**.

Over the past month they made both the fewest sales visits and on-boarded the least amount of new customers. There is clearly a problem here with their ability to hit their **quota of visits** that needs some closer attention.

Before approaching the sales rep to address this issue, take a minute to think over all the **necessary skills** a sales rep needs in order to achieve this specific goal.

Some potential candidates are:

Time-management

Prioritization of tasks

Understanding the importance
of primary goals

Solid route planning ability

**Now that we have our list of necessary skills, it's time to look
at potential sales coaching programs.**

> **Sales coaching needs to be directed at a specific
> skill set which directly affects a business objective**

How to implement a coaching plan

Before any sales manager implements a sales coaching plan it's important they first include the **feedback** from the individual sales rep in question. Too often managers start their one-to-one meetings along the lines of:

"Hey, I've just gone over your monthly performance report and know exactly where you are falling short. This is what the problem is and this is how we are going to solve it..."

This approach in no way empowers the salesperson to reflect on their own performance or promote buy-in to your sales coaching program which is crucial if you want it to be implemented.

A better approach is to plan the sales coaching plan **with** the sales rep and allow them to uncover their own weak points by asking them a series of informative questions.

For example:

"Hey, generally speaking, how do you think you performed over the last quarter?"

"Let's take a look at your weekly sales report, here are the number of sales visits you made compared to the rest of the team, how would you rate your performance?

"So, reflecting on your observations and the metrics that we went through, which skill do you think we should work on and how do you think I can help you develop that particular skill?"

It's more than likely that as their sales manager you have a fairly good idea of where their skills deficiency lays. However, it is important that you be flexible with your sales coaching program and be open to including the feedback from your one-to-one session with the sales rep.

This approach **maximizes the buy-in** from your team and allows salespeople to develop their own independent coaching skills.

Referring back to figure 1.2 as an example, you will remember that sales rep C fell short of their target (20% increase in sales visits).

We already came up with a list of possibilities as to why that might be but remember, we first need to **include their feedback** so start by asking them for their initial thoughts. Then, based on the metrics you've pulled from the CRM offer your own opinion.

Here are a couple of potential scenarios and corresponding coaching plans for sales rep C's shortage in sales visits:

Time Management – One possible explanation is their lack of time management skills. Perhaps they are spending too much with existing customers and not enough with new prospects and leads? Maybe their route planning skills need improving? Or perhaps they are spending too much time bogged down in the CRM with administrative tasks.

If, after discussing with the individual sales rep this turns out to be the case, then a possible sales coaching program would be to encourage them to:

✓ Set daily and weekly activity goals.

✓ Plan out their daily routes to maximize the amount of time spent with new prospects.

✓ Weekly review of task prioritization.

✓ Learning to delegate non sales-driving activities where possible.

You can then monitor and track their progress through a goal setting plug-in tool such as GoalManager.

Lack of motivation – This is a common problem among sales reps, particularly those that have been at the organization for a long time. Telltale signs are the differentiation of hours put in compared to top performers, patchy sales reporting and infrequent activity within the CRM.

The best way to approach this through a deep, personal conversation with the sales rep in question. Try and ascertain:

- ✓ What it is that drives and motivates them?
- ✓ If it's money, ask how much would they like to earn?
- ✓ When would they like to be earning it by?
- ✓ See if there is away you can feasibly link certain sales goals to financial reward.

Once a cause for the lack of motivation has been diagnosed you can implement a coaching plan to help fix it. If reps perceive their quarterly goals to be too high (a common cause for low motivation) then you could try breaking their goals into smaller, bitesize pieces.

Again, their progress needs to be monitored and tracked on a weekly or bi-weekly basis so you can step in and adjust their coaching plan as you see fit.
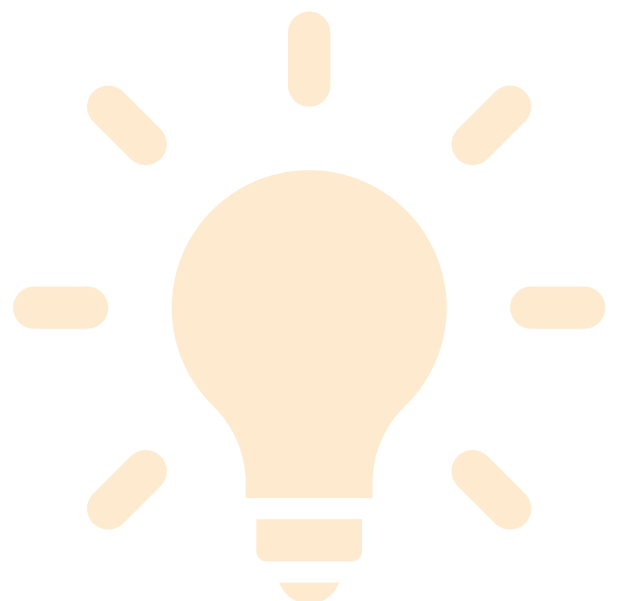
Advice from the experts

Mike Wolpert - Co Founder at Social Jumpstart

How do you organize your sales coaching sessions? Are there any particular methodologies, tactics, strategies you utilize?

All of the one-to-one sessions are built around "tell me the story about this sales call with this client - what went well, what went sideways, what did you learn and how can we be better prepared next time?"

When coaching it's important to stay focused on real life customer/sales problems as this empowers sales reps to find solutions to their own problems, all while keeping the session as focused as possible on their performance.

How do you identify areas that need improvement within your sales team?

We ask about "good / better / best" with an internal focus; "What are you good at? What would you like to be better at? Who on the team do you feel is best at that particular skill?"

It's extremely important to include the feedback from your team when identifying key skills sets that require improvement as this not only builds team spirit, reliance and interconnectivity but also buy-in to the overall coaching plan.

For example, I would lead a conversation with: "I noticed you're good at this, but what about some of the other areas? What are your thoughts? Shall we take a look at some of the best practices from other members of the team?"

How to measure performance

<div style="float: right; font-size: 200px;">4</div>

The fourth and final part of the sales coaching plan is measurement.

This is crucial as without it, how are we to know to know if what we put in place is working or not?

To do so you can again set up a customized sales report within your CRM to monitor and track the **selected metrics** from the second phase of the plan.

For example, take a look at figure 1.3 for a reference on the skill development of sales rep C from figure 1.2
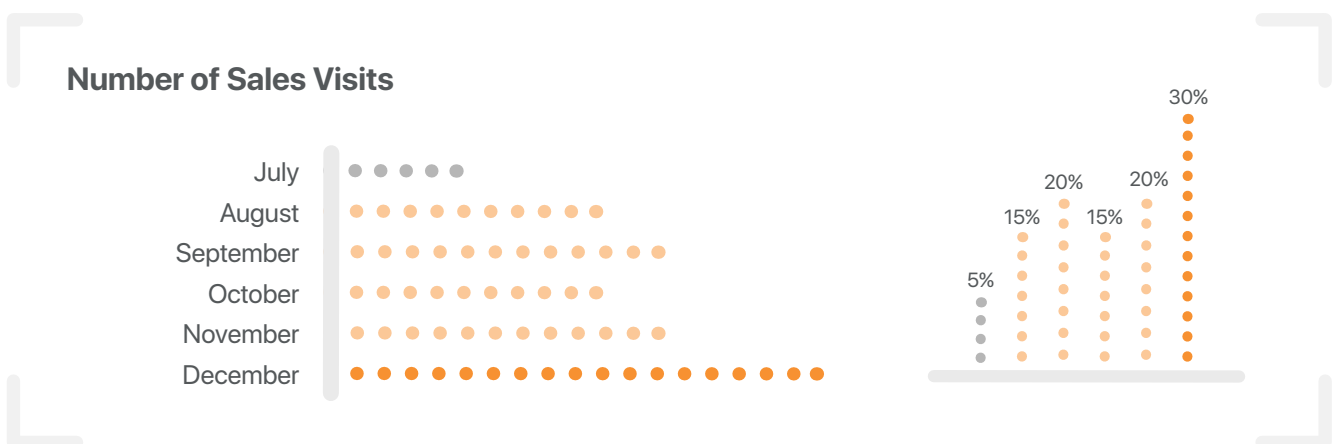
Number of Sales Visits

Figure 1.3

As you can see form this custom sales report, sales rep C has gradually increased the number of sales visits made throughout the course of the year, indicating that the sales coaching program implemented is working.

This should be consistently tracked and followed-up with one-on-one visits to monitor their progress. If the numbers steadily decline, talk with your salesperson to find out why and adjust the sales coaching plan accordingly.

Why setting goals is so important for sales coaching

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As we have just seen, the final and arguably most important step of a sales coaching plan is measuring performance against **relevant sales goals.** It informs sales managers if the plan in place works and if not, how and where changes should be made.

Not only that, but when field reps are shown how their individual goals contribute to the much larger vision of the company, each sale and account closure suddenly has tangible value and can be extremely effective in **motivating** your team.
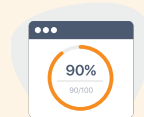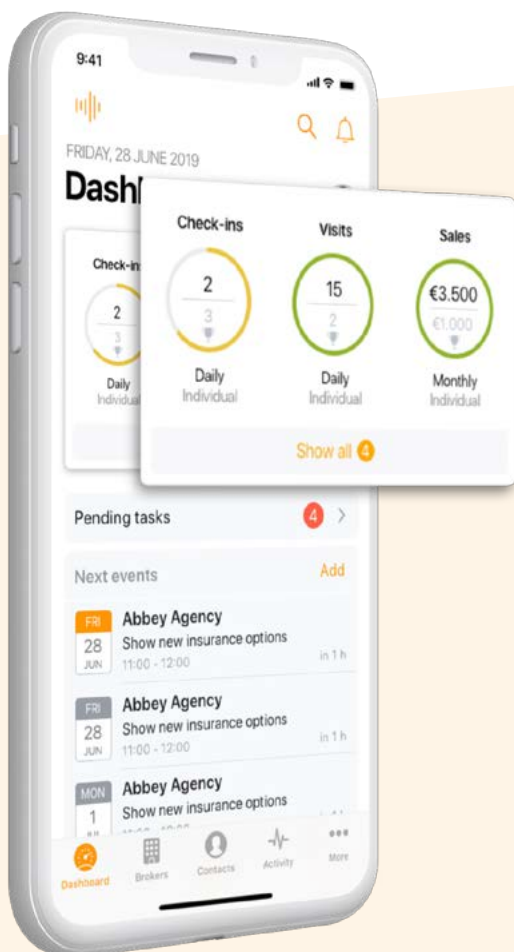
What happens when **your team** don't have **tangible objectives?**

- Lack direction

- Little motivation to achieve their objectives

- Difficult to measure performance

How do I solve this problem?

Trust in technology that helps your team reach their goals

GoalManager

GoalManager breaks long-term objectives into smaller, bitesize, more manageable targets along your quarterly roadmap.

Did you know, that field sales reps who can track and visualize their own individual sales goals are 20% more likely to increase sales?

- Increase sales productivity

- Real time visibility on team performance

- Pinpoint weaknesses for potential improvement

- Substantial boost in team motivation

Giving feedback to your team

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One of the fundamental skills of any leader is to provide feedback (both good and bad) to their sales teams.

Not only does it help managers coach their sales reps and increase sales productivity, but it's also an opportunity for individual development and potential career advancement.

Why is it then that sales managers struggle when it comes to giving feedback?

Some of the most common complaints from sales reps are:

- ✓ Sales managers are too vague with their feedback.
- ✓ Negative feedback exceeds positive reinforcement.
- ✓ Feedback involves psychoanalysis (you are behaving like this because of your personal situation, divorce etc.)
- ✓ Managers use inappropriate humor when giving feedback.
- ✓ Managers tend to drone on too long when giving feedback.

So how should you go about giving feedback to your salespeople ?

Effective feedback is about communicating a **specific** message, clearly, to your salespeople based on performance-based data. They should be able to walk away from your meeting with a **clear idea** of what it is they did right (or wrong) and the impact it had on their performance.

If you can nail this specificity with your feedback you'll find salespeople are a lot more susceptible and even motivated to adjust their behavior.

However, being specific isn't going to be enough on its own – you will also have to work on the message's delivery.

Approach a sales rep when their body language is telling you "now is really not a good time," and then start directing coaching advice at them, and you will likely find:

- They won't like it.
- They will resent your feedback.
- They won't act upon it.
- They learn absolutely nothing from the process...

So with that in mind, when you do get some face-to-face time with your salespeople try to create a sense of openness over the idea of giving feedback.

One way to do this is to ask for their **permission** before providing feedback.

For example, let's look at a possible scenario between yourself and Sales Rep C from figure 1.2.

After an initial conversation you both determine that Sales Rep C's struggle to meet their targets was down to poor time management. You implement a coaching plan to target a specific weak point (prioritization of tasks) which using the GoalManager plug-in, allows you to break it down into smaller, weekly, bite-sized pieces.

However, after 3 weeks into their coaching plan sales rep C is still falling some way short of their goals, so how do you deal with this particular scenario?

Remember, you have to be **specific** with your feedback: discuss exactly what part of the plan they are falling short of and choose your words wisely to disarm their natural self-defense response to criticism.

"If you don't mind I'd like to make an observation regarding the last 2 weeks of your coaching plan **(permission)**. You are on target for achieving 1 of the 3 goals we set last month so congratulations is due, well done. What did concern me though was how far behind we are with task prioritization **(specificity)**. We agreed that in order to increase the number of new customers its important you prioritize sales visits to new leads over existing customers."

> "
>
> "As I talk about this I'm aware of how uncomfortable it is (acknowledge uneasiness) however this is an area that needs addressing. What can I do to help?"

Giving "negative" feedback is never an easy thing to do, but by making sure you:

- ✓ First ask permission
- ✓ Are specific with your points
- ✓ Acknowledge the uneasiness of the situation

You can defuse a potentially explosive situation and offer receptive, actionable feedback that will positively affect your salespeople's performance.

Advice from the experts
Tom Stanfill - CEO at ASLAN Training

How do you organize your sales coaching sessions? Are there any particular methodologies, tactics, strategies you utilize?

The coaching conversation is so, so important when it comes to starting a session. It allows both the manager and salesperson to diagnose that one, specific behavior that would have the biggest impact on performance vs. an overwhelming list of possible candidates.

So making sure your salesperson is clear about the specific activity or assignment they need to work on, vs. a general 'work on xyz,' would be my biggest recommendation when developing a coaching plan.

How do you manage your field sales team and track overall performance?

I always make sure our salespeople understand that a certain number of calls, meetings, proposals and other activities related to a specific sales objective need to be achieved in order for them to hit their numbers.

Then I make sure they can visually see their progress each week, ideally through a goal-setting plug-in to our CRM. The key is that they feel accountable to themselves, not me, their sales manager.

Is communication the key success?

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Did you know that over **70%** of sales directors believe that poor communication with their team negatively impacts performance?

This primarily comes down to companies not having an internal sales communication tool that gives managers 360 degree visibility over sales activity, pipeline management and the progress of sales reps' individual goals.

This isn't to be confused with maintaining "control" over their team, but rather viewed as an opportunity to uncover areas that need special attention.

For example, they might be rolling out a new product line that they want their sales team to initially push to a niche profile within the market. But with ineffective communication channels and the relatively difficult to track nature of email they have no way of knowing whether this strategy is being implemented or not.

Perhaps the team needs additional training with the product? Is the market not as perceptive as initially perceived? Or is the campaign seeing genuine success?

Without effective communication between the manager and the rest of their team it's difficult to know exactly how to coach individual sales reps.
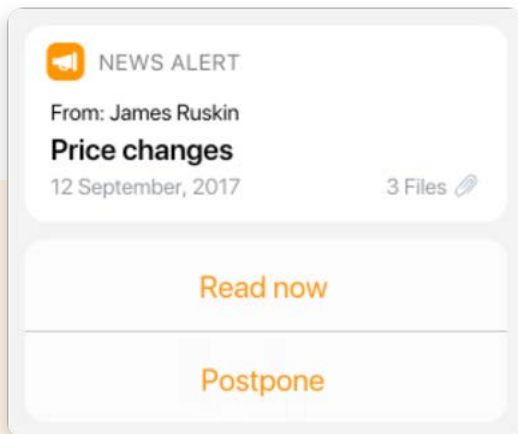
70%

of sales directors that **poor communication** with their team negatively impacts **performance**

What causes this lack of communication?

- No effective communication tool in place
- No centralized system for sales updates
- Key information not being received by the sales team

Do you want to improve communication with your team?

Invest in technology that helps with your day to day work.

NEWS ALERT

From: James Ruskin
Price changes
12 September, 2017   3 Files 📎

Read now

Postpone

Price Changes

Pending

15
(50%)

Eva San Jose

Chris Angelotti

Larissa Isenhart

Confirmed   View all

NewsManager

NewsManager ensures that all communication with your team is sent, received and understood.
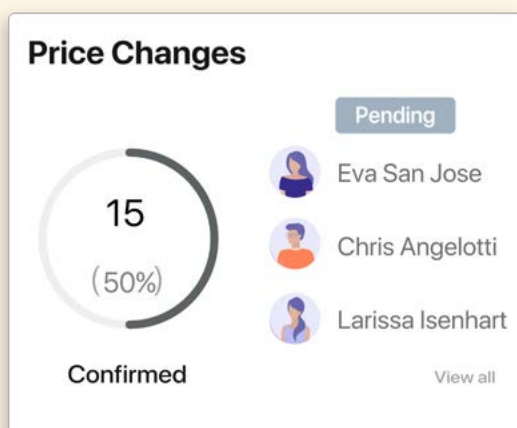
What are the benefits?

- Complete alignment between sales team and strategy
- Managers can optimize their follow-up with specific team memebers
- Track the flow of important announcements

What do our customers say?

"The mobility for operating out in the field was really important to us as beforehand there was a bit of a chasm; what happened outside of the business on the road tended to remain that way"

MADE BETTER BY
ELLIS

TOM ELLIS
Managing Director at **JT Ellis & Co**

"ForceManager gives us the visibility of our sales processes needed to ensure we are managing our entire customer portfolio. As such, we have increased upselling by 15% and also the number of visits per transaction by more than 10% "

venair

CARLOS DUARTE
Sales Manager at **Venair**

What do our customers say?

"Thanks to ForceManager, not only have we been able to hit our sales targets but the job satisfaction of our Tech Reps has increased, noted by the user adoption of the application

In addition, we are working more efficiently, spending less time reporting and able to divert our attention towards more sales-driving activities"

ALBERT FREIXA
Marketing Coordinator at **Asics**

"Now our sales reps have little problem entering data into our CRM system. ForceManager also gets straight to the point, allowing us to track all key information before, after and during a sales call"
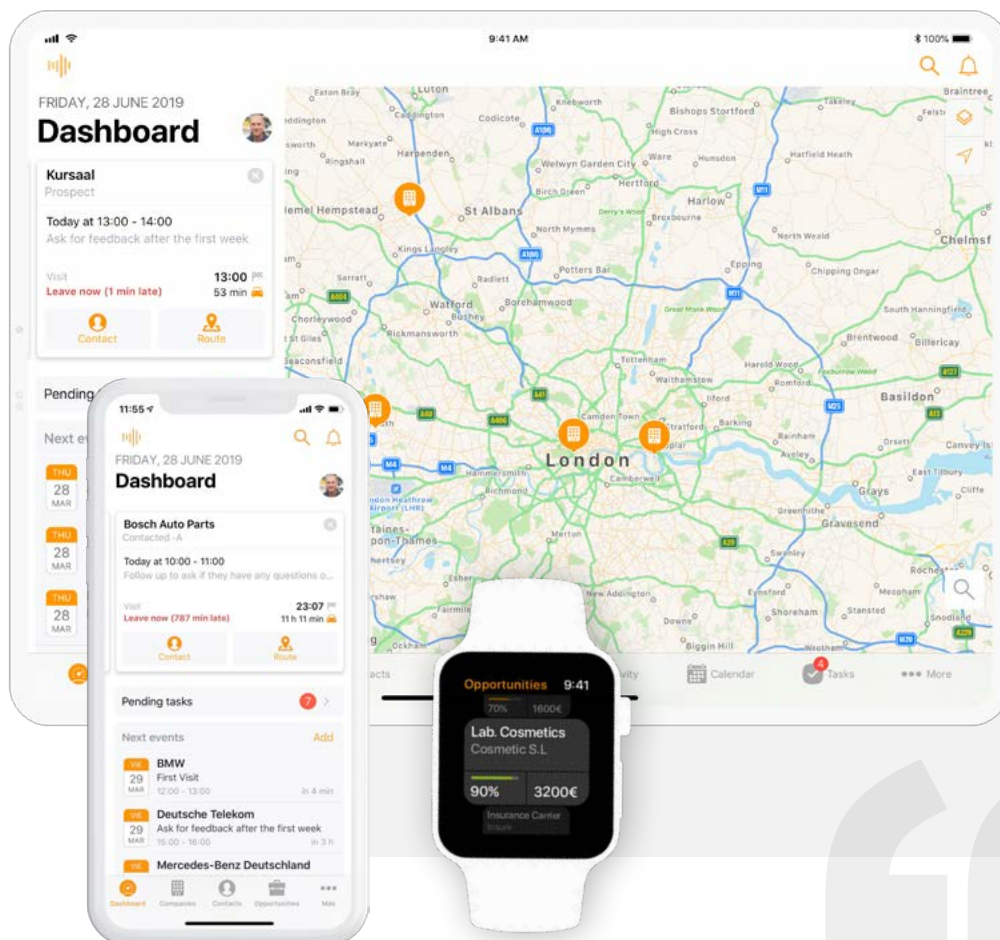
PHIL HARVEY
Sales Director at **Gulfeagle Supply**

Want to see how **ForceManager** can help deliver you accurate sales reports?

Request a Demo

A consultant will help answer any questions or queries you may have as well provide examples of how other companies are utilizing ForceManager's personal sales assistant to maximize their sales process.

Visit our Website