A Transforming Sales Results eBook

Sales Coaching Excellence:

The Path to a Best-in-Class Sales Force

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Transforming SALES RESULTS™

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Introduction

There are a lot of parallels between business and sports. You don't have to look far to find books, blog posts, and countless articles offering analogies between these two 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:

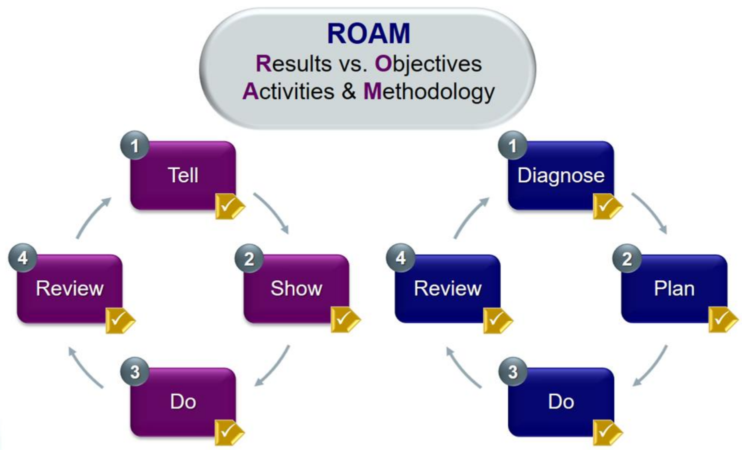
Frontline sales management is one of the most challenging jobs in business today.

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

This chaos 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. And that way is 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 performance analysis
- 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

What Is "Sales Coaching," Exactly?

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

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

What to Coach

FLSMs might coach on a large variety of things, ranging from strategic, to tactical, to skills-based, to personal. These are some of the types of coaching.

Types of Coaching

- Territory optimization
- Account planning
- Lead management
- Prospecting
- Product / services / solution knowledge
- Sales call & meeting planning
- Sales call & meeting management
- Opportunity qualification
- Opportunity management
- Pipeline / forecast management
- Strategic account management
- Time / task management / organizational skills
- Career / professional development
- Skill development / behavioral coaching
- Mindset

Skill Development & Behavioral Coaching

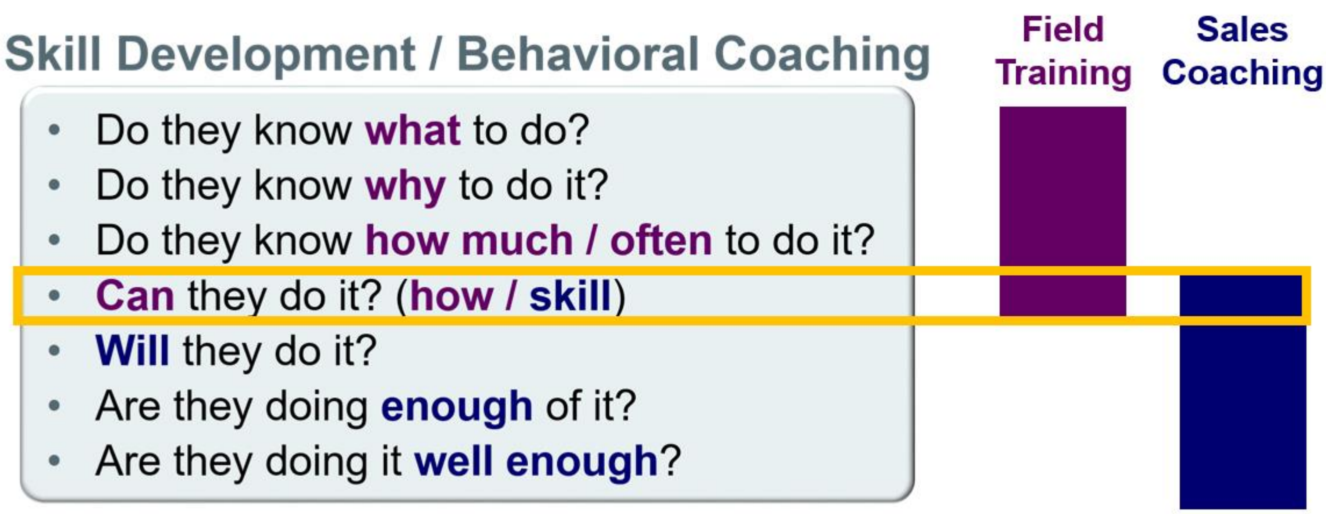
The methods we'll discuss in this eBook have multiple applications, but will be primarily slanted toward Skill Development and Behavioral Coaching. The focus will be on answering these key questions:

- Do the sales reps know **what** to do?
- Do they know **why** to do it?
- Do they know **how much/how often** to do it?
- **Can** they do it? (Do they know **how** and have the **skill**?)
- **Will** they do it?
- Are they **doing enough** of it?
- Are they doing it **well enough**?

When you think of it this way, Skill Development and Behavioral Coaching can be separated from the list on page 3 and span across all the other types of coaching. The best practices within the other types (the best practices for territory optimization, account planning, or prospecting, for example) become the solutions, or the "performance interventions" to solve a specific performance problem. (They can also be part of a sales enablement certification.)

The above questions – the precepts of Skill Development and Behavioral Coaching – also help to explain how Field Training and Sales Coaching overlap and dovetail. This is an important element to remember when we discuss the training and coaching models later.

While training and coaching are different, I consider "Field Training" (done by managers vs. a sales trainer or sales enablement team) to be an integral part of an overall sales coaching strategy. Your reps will first need clarity on what to do, why to do something, how much or how often to do it, and how to do it, before they can hone their skills and work on doing it better.



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.

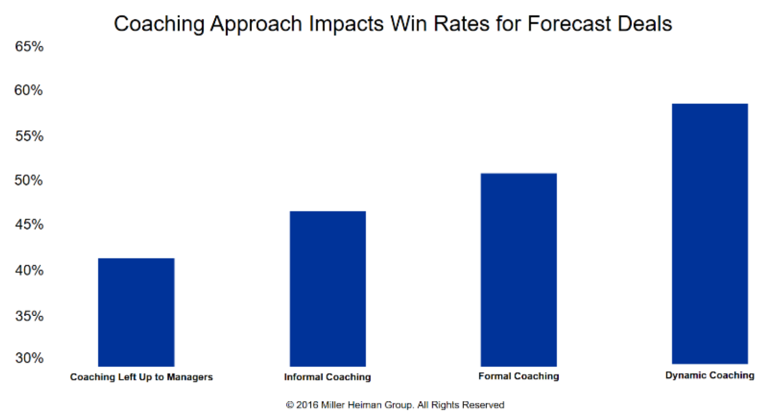
There are two simple approaches for teaching and validating knowledge and skill that will guide reps to more effectively use what they know and improve what they do. These approaches are:

- Directive: Telling, discussing, showing, validating knowledge and skill
- Facilitative: Questioning, listening, involving, engaging, leading

Why Coach

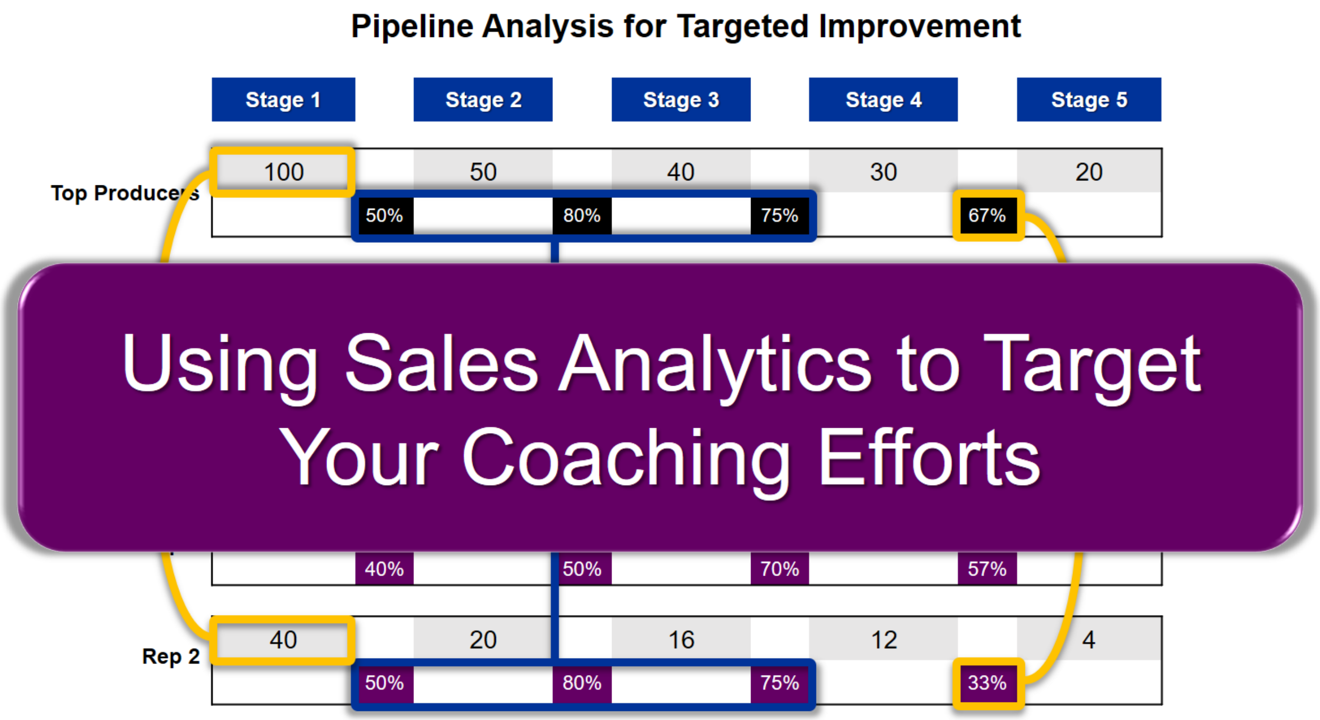
We hope the value of coaching is inherently clear, but for the skeptics, here are some data points that support its power:

- 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 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.

How to Use Sales Analytics to Determine Where to Spend Your Coaching 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 top-of-the-funnel lead generation, through the opportunity pursuit stages to the close, and then onto strategic account management (a separate process).

Your sales process should be aligned with your customers' buying process. For both processes, start by defining and aligning the stages. Then, for each process state, document the objectives, the tasks to be performed, and the exit criteria. Exit criteria are what must be completed in each stage before moving to the next. In a buying process, exit criteria are what each decision maker must see, hear, feel, understand and believe, in each stage, to feel comfortable moving forward to the next stage, with you.

Sales Methodology

This is a term that often confuses people (it's most often confused with process). Sales methodology is what your reps do in each stage with the buyers to move an opportunity to its next stage. Not every task is a sales methodology, just the interactions with the buyers, or the frameworks, models, skills, competencies and behaviors that your reps use to advance the sale (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).

You should document what your company's top reps do in each stage as your current best practices. You should do the same with the list of the "types of coaching" on page 3. You will refer back to these curated best practices often, using them as the solutions that will help your reps close performance gaps.

CRM / Pipeline Tracking

Using a CRM is highly recommended for most organizations and mandatory for enterprise B2B complex sales. 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 (or implement a larger one, simply). They come in all shapes, sizes, price ranges, and levels of ease or complexity and ability to customize.

For this purpose of performance analysis, you need the ability to track:

- Your sales process stages
- Number of opportunities in each stage
- Conversion ratios between stages

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

- Top producer averages (suggested: top 10 or 20 percent)
- Mid producer averages (suggested: 10 percent above and below "average")
- Sales team averages (by manager)
- Averages for the individual reps on a team

Considerations:

- This is a historic report. 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 exact approach that will work for everyone. We usually recommend a backward look that is at least the length of the average sales cycle (if it's less than 3 months, double it; if one month or less, triple it). 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.
- In addition, you should track other metrics, like average deal size, velocity, sales productivity (revenue per producer), and win/loss ratios. For this sales analysis we will 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, but the analysis of these other metrics can yield good performance insights.
- As needed, seek support from your sales operations leader, a business analyst or data analyst, a data scientist, or a consultant. The collaboration and added expertise can provide unexpected added value.

Pipeline Analysis

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

The Pipeline Analysis Dashboard

As a reminder, this is not the dashboard to use daily because it's a historic view for analysis only. When looking for ways to improve production, though, this dashboard is a great tool:

Pipeline Analysis for Targeted Improvement – Fig. 1

	Stage 1		Stage 2		Stage 3		Stage 4		Stage 5
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

This chart shows why the Preparation stage is important. The data in this example has been simplified for illustrative purposes but it is a real-life example – you'll need to customize based on your needs. The dashboard includes:

- Top Row: The process stages – in this example there are 5
- 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 only has two reps for simplicity – they are two of the lower-performing reps on this team).
- Within the dashboard: The number of leads or opportunities that were worked in each stage in the period reviewed (a historical review over the length of the average sales cycle).
- The conversion ratios between stages.

The Analysis

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

Pipeline Analysis for Targeted Improvement – Fig. 2

	Stage 1		Stage 2		Stage 3		Stage 4		Stage 5
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

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

- She’s working with fewer opportunities in Stage 1 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 Stage 4 to Stage 5 (close) is far lower than the top producers, average producers, or your team.

From this analysis, you can see what you need to do: Help her generate more opportunities and improve her last conversion stage.

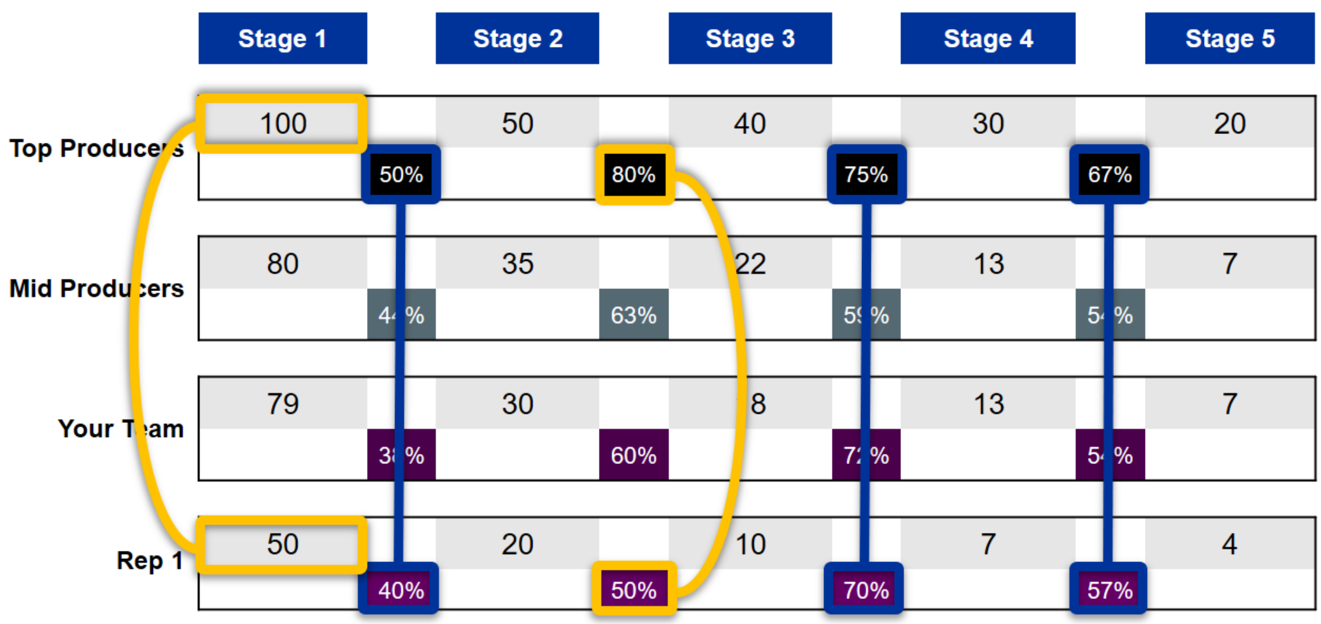
Rather than trying to make the leap to top producer status, the manager started by working to get this rep to his team average of 70 leads/opportunities and a final conversion ratio of 54 percent. If she can improve in both these areas, **she’ll deliver a 64 percent improvement in closed deals**. That’s 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. While the numbers weren’t exact, the manager and rep in this example accomplished this goal in just three months (which was the length of their average sales cycle).

Extreme example? Not really. This can happen at any organization when FLSMs analyze, train coach and follow up effectively.

Here's another example, looking at Rep 1:

Pipeline Analysis for Targeted Improvement – Fig. 3



In this case:

- 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 to produce more qualified opportunities.
- Help the rep convert better between Stage 2 and Stage 3.

Considerations: On your own team, Rep 2 might be able to offer mentoring and guidance for Stage 2 conversions in return for help from Rep 1 in improving Stage 4 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.

What I often hear sales managers say to their reps:

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

SCENARIO 1

What I wish I heard more often:

"Hey Ruth, I'd like to spend some time with you when you're working with buyers in Stage 4 moving toward Stage 5."

SCENARIO 2

Notice the difference? Assuming you've done the analysis that directed you to further investigate what is happening (in this example, in Stage 4 with Ruth), the second scenario will be far more likely to provide a chance for you to help her improve performance in an area that will lift results.

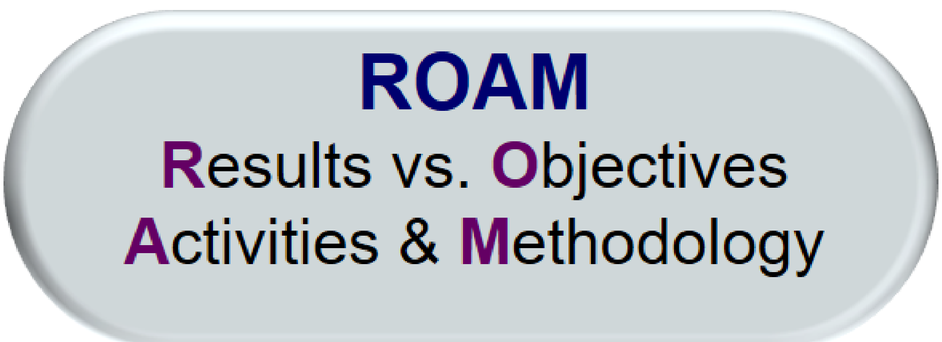
Note:

- The dashboard and analysis methods recommended in this section are designed to help you determine where to spend your limited and 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, until you decide to remove them from your team for non-performance. These methods will help you determine how to spend your time with each.
- In addition, as already stated, these dashboards are backward-looking for performance analysis. They are not meant to manage your pipeline daily. They *can*, however, indicate where a manager may want to investigate and support their reps, in active opportunities.

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.

ROAM is an acronym for:



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 for Account Executives, 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, the appointment is also 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 is a starting point for where to coach for a quick-hit improvement.

Objectives

Next, you compare **R**esults to their **O**bjectives (their goals, quotas, or performance benchmarks) to see how well they're doing. In the previous section, 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 an 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 **R**esults and the **O**bjectives 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 **A**ctivities 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 (shorthand for sales methodology) is the *quality* assessment, where you need to explore *how well* reps are doing the activities. This includes:

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

This is where all the known best practices should be curated, 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. Even if a rep is engaging often with the right buyers, if they fumble their way through those interactions, 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 performance analysis methods from the previous section, 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 stage 3.

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 field training, sales coaching, or some other intervention. In any case, if you know the best practices that get results, you have the content to help your rep close the gap. We'll discuss how to determine the best performance intervention in the next section.

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.

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. Coaching may still apply here, 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, however, 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. 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. The choice is yours.

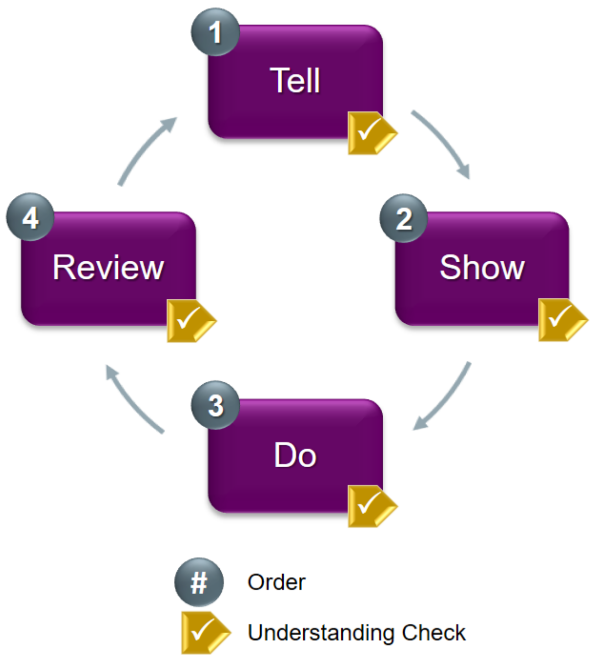
How to Conduct Field Training

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 significantly underutilized and critical to success.

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. (This step is a definite role play.) Role playing back validates that the rep not only understands it, but *can* do it. (It doesn't guarantee 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.

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. Some skip this step and move directly to live application with the sales rep, but I prefer having the rep see the skills used effectively by someone else in the less clinical real-world where unexpected things happen.

- 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 where field training dovetails with coaching.

You can also extend this **Review** phase, as needed, with Check-ins, until the specific skill you are teaching has been mastered.

Extending the Review Phase with Check-ins	
Who	Coach & Sales Rep
What	• Phone call, virtual meeting, or face-to-face meeting • Review of **R**esults | **O**bjectives | **A**ctivities | **M**ethodology • Set performance goals, develop solutions, create an action plan
Why	Even the best players need a good coach to improve
How	❑ Review **R**esults/**O**bjectives ❑ Review **A**ctivities ❑ Observe **M**ethodology ❑ Set Performance Goals ❑ Explore Possible Solutions ❑ Select the Best Solutions ❑ Create an Action Plan 

To recap, here's why this **Tell / Show / Do / Review** 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:

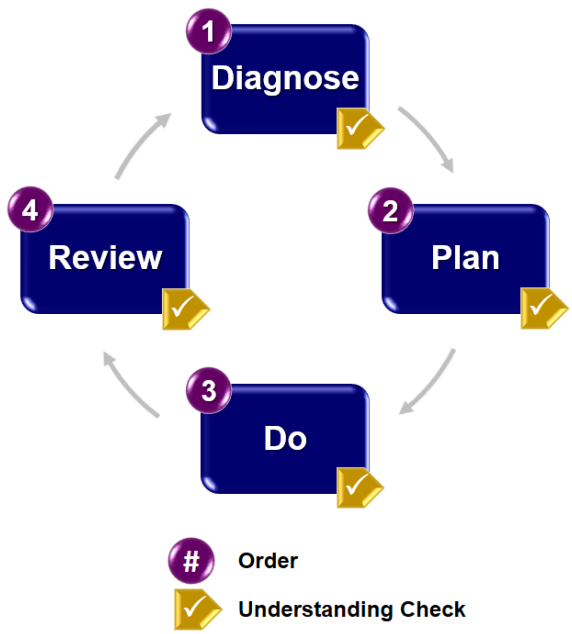
- Coach to help them improve on what they know (discussed in the next section).
- Begin to explore other reasons for non-performance on the **Conditions, Reasons, and Solutions for Performance** chart and address them.

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 **Conditions, Reasons, and 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



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**. 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, too, 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. 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.

This is similar to **Extending the Review Stage with Check-ins**:

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 **R**esults vs. **O**bjectives ❑ Review/observe/analyze **A**ctivities ❑ Review/observe/analyze **M**ethodology ❑ Determine “What Is” (Point A) and “What Should Be” (Point B) ❑ Set performance improvement goals with your rep ❑ Explore possible solutions (facilitate/guide but insert best practices as needed) ❑ Gain consensus on the best solutions ❑ Create an Action Plan

And then, as always:

- Use an **Understanding Check** to validate the rep's 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** chart. 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

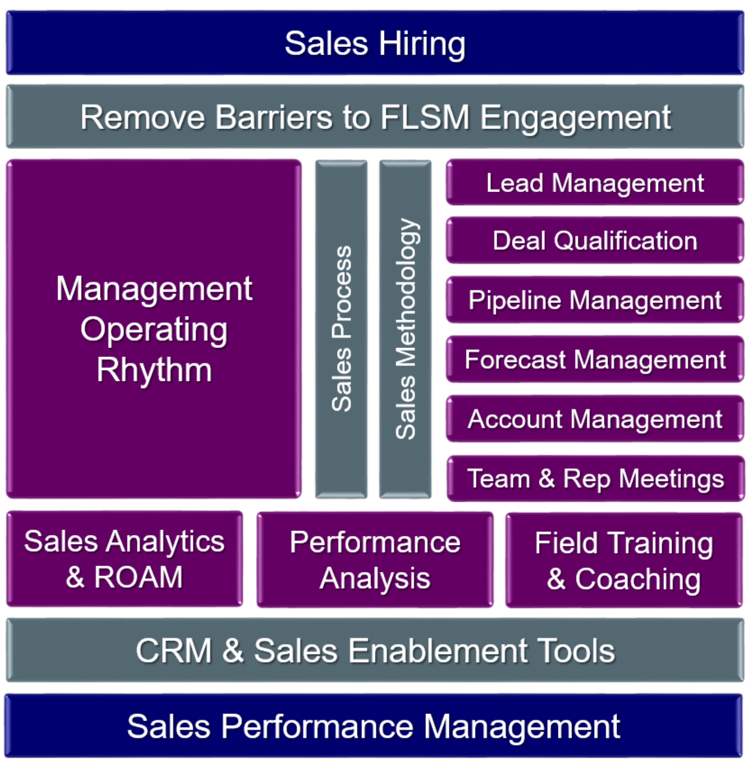
From our detailed descriptions of sales analytics, **ROAM**, field training and sales coaching – which we did to be as clear as possible – you might assume the developmental coaching we've outlined will take a lot of ongoing time and effort.

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 (like the Pipeline Analysis Dashboard) and learn the basic strategies (**ROAM**, performance analysis, and the field 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 skill development and behavioral 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 Sales 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 team meetings, formal pipeline and forecast management meetings, and regular one-on-one meetings 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.

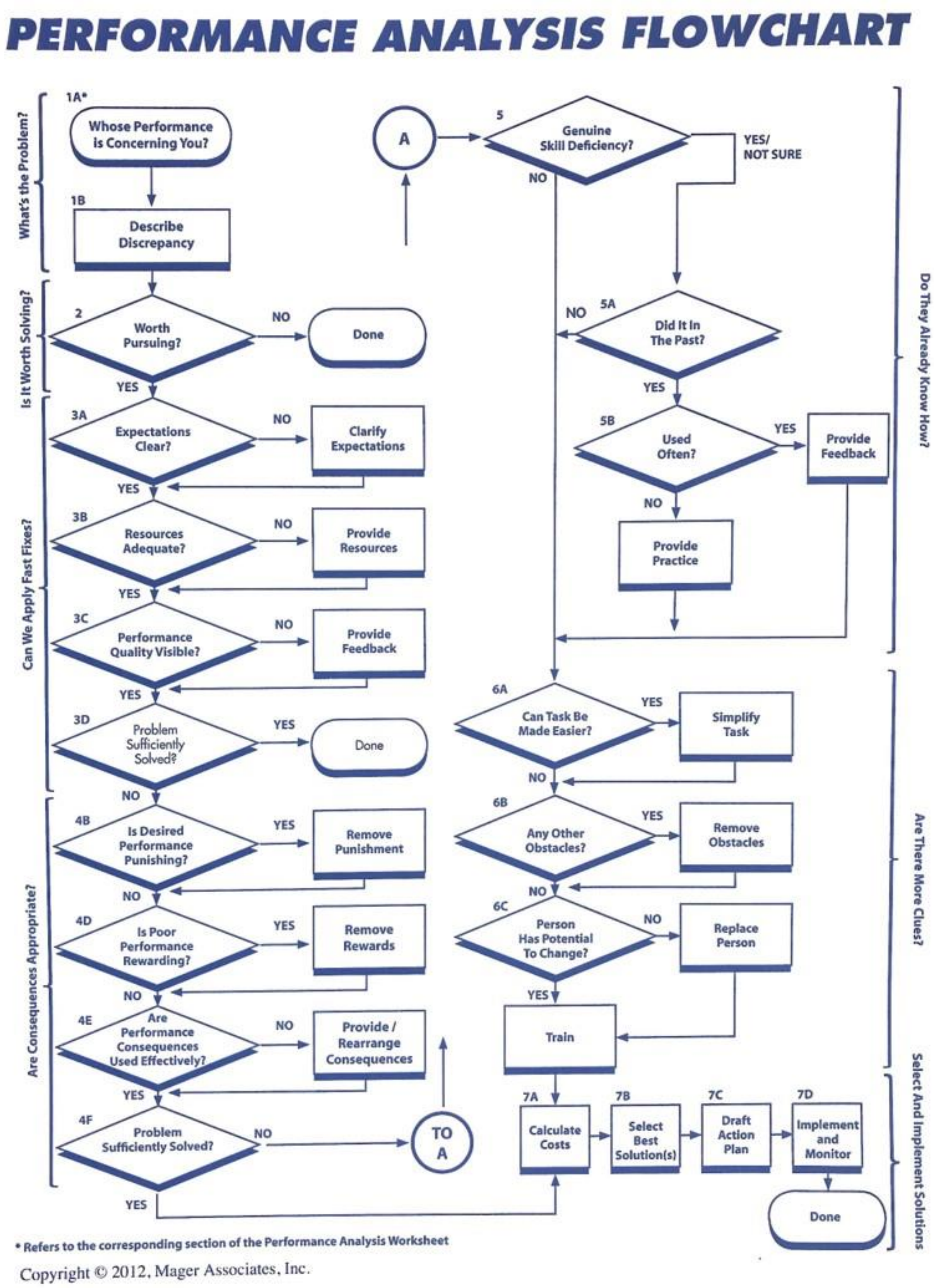
To maximize the effectiveness of your sales team, it's key to assure all reps are properly trained, frameworks have been established for ongoing coaching and development, and to follow through with a coach's mindset as you work with your reps. It won't always be easy, and it won't happen overnight, but 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.

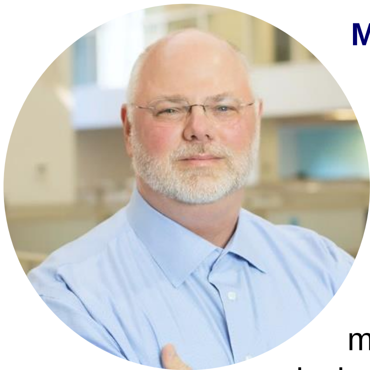
If all of this seems overwhelming, and you don't know where to start or how to make it stick, we've got your back. My team at Transforming Sales Results, LLC and I have extensive experience working with sales teams of all shapes and sizes, and we've helped many organizations build their bottom line by 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 and Pipe's Performance Analysis Flow Diagram



ABOUT THE AUTHOR



Mike Kunkle is the Founder of Transforming Sales Results, LLC. 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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