



Coaching Decoded!
A Practical Guide for Managers

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On a recent plane ride from Los Angeles I happened to be seated next to a Senior Vice President of Sales returning from her company's annual sales meeting. The article I was reading on sales force effectiveness caught her attention and prompted a conversation that centered on a common theme Huthwaite often hears from senior level managers. She had become frustrated that her ability to have a direct impact on the skills and effectiveness of her sales force decreased as she moved higher in the organization.

This paradox of sales management is common and predictable. The higher executives ascend in an organization, the further away they move from what McKinsey and Company—thought leaders on business management strategy—calls the “pivotal job.”

In a classic management hierarchy, McKinsey argues, there is usually one particular level or job that has more influence on organizational performance than any other: the “pivotal job.” Influencing the position of the pivotal job can have a real impact on the performance of the whole organization. Conversely, a lack of influence makes chances of improving overall organizational performance slim.

In any sales organization, the pivotal job belongs to the front line sales manager.

No other level of management has so direct or profound an influence on sales effectiveness. Senior management can influence sales efficiency through policy decisions and systems, but skills and effectiveness are the domain of the front line sales manager.

During the discussion, the SVP realized she had been promoted beyond the pivotal job and—as such—the responsibility to directly influence the skills and effectiveness of salespeople was no longer hers. Her role as an executive meant overseeing and improving the systems and processes that enabled those with pivotal jobs to be more efficient and effective not only as sales managers but, also, as coaches.

Coaching is common sense, but is it common practice? Huthwaite has yet to be involved with a sales organization that didn't speak highly of coaching, but few managers actually understand what good coaching really means. Of those that do, many fail to recognize the barriers to coaching effectiveness and how to overcome them.

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is it common practice?*

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Huthwaite has done exhaustive research on coaching best practices. We understand the importance of an organizational *coaching culture* and the individual behaviors indicative of excellent sales coaches. In this paper, we will discuss building a coaching culture and the principles behind effective sales coaching—including the actionable steps which will help your people develop professionally and improve the skills needed to generate greater top line growth.

Building a Coaching Culture: Action Items for Senior Sales Executives

Coaching receives great lip service in many sales organizations, rivaling only value in its ubiquity.

The perspective of most corporate level sales managers on coaching could best be paraphrased as, “The most important function for sales managers is coaching. There is no skill valued more highly. A lot of time and money are spent hiring and training good salespeople. If managers aren’t coaching, they are not doing their job.”

But once engaged in a client relationship, all too often it is discovered that little or no coaching is actually occurring. The reason isn’t hard to find: coaching doesn’t have to be finished by Friday. Stephen Covey refers to this as “important but not urgent”.

Set the Priorities in Stone

The truth is that competing business pressures invariably interfere with coaching practices. To overcome this inevitable scenario requires that the process be driven from the top down—meaning from those who set corporate priorities in the first place. Top sales management has to demonstrate through their actions that nothing comes before coaching.

To ensure coaching remains a priority regardless of competing pressures, companies should design and implement a systematic and structured coaching process:

Bring sales managers together, teach them coaching skills and obtain their commitment to putting coaching into practice.

Ask each manager to choose a limited number of salespeople to coach (see Huthwaite’s *The Importance of Sales Coaching: Six Characteristics of a World-Class Sales Force*). Early on, as the organization gets a handle on competing priorities, it is better to coach the right people in depth than to try to coach many.

Ask managers to set—and share with you—a coaching schedule one quarter in advance and then review it with them.

Help managers set coaching goals in terms of the number of coaching calls or coaching strategy discussions they will make with each salesperson and the types of skills they will work to develop with their people.

Meet with the managers monthly to review progress, discuss difficult cases and reinforce the coaching process.

Enable Your Coaches

Invariably, many people become sales managers because they were highly successful salespeople. Thrust into the role and eager to make their mark, they dutifully ride with their team members and attempt to teach the same skills that made them successful. This is not coaching. Unfortunately, few ever attend formal training as coaches. It's not enough just to inform. What counts is the methodical explanation and demonstration of the what, how, why and when to coach.

Coaching, just like selling, has specific skill sets—the fundamentals of which require formal instruction.

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Formal coaching training will provide the following:

Common Language—a good model gives the basis of a common language that lets senior management, the sales manager and the seller communicate quickly and meaningfully about effective selling. This shared jargon provides a shorthand that makes it much easier for people to discuss experiences.

Diagnosis—if a manager has a clear picture of effective behaviors it becomes much easier to diagnose the strengths and weaknesses of individual salespeople. A good effectiveness model must describe the specific and detailed behaviors that successful salespeople use as well as allow the coach to pinpoint which skills and behaviors need to be developed through coaching.

Skills—the skill set for world-class coaching is very different than that of selling. Coaches need to learn the skills that are unique to coaching. It is also important that sales managers go through the same skills training as their salespeople. This will bring the common language into play, hone sales managers' diagnostic abilities, and provide a common understanding of the skills that reflect world-class selling.

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Alleviate the Proliferation of Paperwork

Most activity management systems depend on some sort of call reporting, which in turn depends on paperwork. In this day of laptops and sales force automation, let's not kid ourselves; whether it's pen and paper or tapping it out on a keyboard, it's still paperwork ... and paperwork is the unmitigated evil of any sales organization.

It's not that salespeople, especially top performers, have an instinctive hatred of paperwork—it's something more fundamental. One can almost measure the health of a sales organization by the energy it puts into dealing with its customers compared to the energy spent on internal procedural demands.

Our advice to clients has often been, "Cut your paperwork in half." If half the effort invested into call reporting were refocused towards call planning, there would be greater success to report. If you want to increase sales productivity in major sales, focus on planning, strategy, and the customer. Do your best to minimize reporting, paperwork, justifications and all the assorted nonsense that causes sales management systems to sink under their own weight.

And Finally, Reward and Reinforce Coaching

One of the reasons coaching does not happen in most organizations is managers receive little or no encouragement to coach from senior management. It's unusual to find a company that actively recognizes coaching by reward or job advancement. It's not that these companies don't recognize the importance of coaching; it's that few have developed a method to quantify or measure the value of coaching. In the business world, what gets measured gets done. In the sales world, what gets incented gets done with vigor.

Not all incentives have to be monetary; in fact, when it comes to coaching, non-financial rewards can prove just as effective.

Make coaching part of the performance appraisal.

Coach of the Year: We worked with one company which at the end of the year delivered all of the usual sales performance awards. The most coveted award, and the last of the evening, was the Chairman's Leadership Award—given to the sales manager who most embodied the principles of coaching.

Use peer group coaching projects to practice coaching, and recognize coaching thought leaders.

Finally, read the coaching trip reports your sales managers generate. They'll give you great insight into his people and how they are being coached. Pen a few comments in the margin of the report and send it back to the manager. They want your feedback and want to know their coaching work is being seen.

What effective coaching looks like: Action items for the sales manager

Today's sales manager wears many hats and fulfills many roles. The two most important—to the exclusion of all others—are that of *coach* and *selling sales manager*. It is critical that these two roles be kept separate and distinct in the eyes of the manager, the seller, and most importantly, the customer.

Usually, the sales manager is the team's best salesperson. Although the most successful managers do little selling themselves—concentrating instead on managing the activities of their sales teams—there are specific occasions when it is appropriate for the manager to step into a selling role.

Principles for manager's involvement in face-to-face selling:

Principle #1

Only become involved in face-to-face selling when your presence makes a unique difference.

Principle #2

Don't make a sales call unless your salesperson is with you.

Principle #3

Before any joint call, agree on specific and clear selling roles with your salesperson.

Principle #4

Be an active internal seller for your salespeople.

Principle #5

Always have a withdrawal strategy that prevents any customer from becoming dependent on you personally.

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Coaching

Coaching is an often misused term used to cover a broad range of sales manager interactions with their people. While managers frequently use the term coaching, in practice their role would be more accurately described as counseling, modeling, or training.

Coaching is narrowly defined as honing the skills already trained. Counseling, in contrast, is correcting a behavior that is inappropriate or otherwise counter-constructive to the business. Modeling is demonstrating what a skill should look like. Training is teaching a skill or set of skills that the person has not otherwise been exposed to.

You can teach a person the mechanics of a good tennis serve; you can model what a good serve looks like; and you can counsel them that staying up late is not conducive to good tennis. None of these things are coaching. Coaching is observing the tennis player in action and helping them develop unique skills within their game. Let's break coaching down into its key component parts.

Call Planning

The successful seller and the successful coach will allocate substantially more than the usual twenty minutes to call planning. They will spend that time planning desired outcomes, call strategy, the appropriate advance that defines success, and the specific skills the seller would like to work on and would like their coach to observe during the call.

The excellent coach comes up to speed by asking questions such as, "Where is the client in the buying cycle?" "What outcomes are you looking to achieve in this call?" "What outcomes would the client like to achieve?" "What implied needs have been expressed?" "Have you, or how will you, convert those into explicit needs?" "What might be an appropriate advance for this call given the stage of the sales process?" "What role would you like me to play in this call?"

This kind of pre-call planning has many benefits, most importantly positioning the seller for a successful call outcome. From a developmental standpoint, it reinforces best practice for call planning so that sellers are more likely to repeat the behavior when you're not around. Moreover, it creates the foundational framework from which to properly review the call.

In other words, if you aren't involved in planning the call, how can you review the execution of the call against the plan? You can't. All you can do is discuss what went well and what might have gone better. It might be evaluating, but it's not coaching. An excellent coach always coaches to the skills known to be effective and those which have been pre-planned.

In Skills Coaching, Less is More

Excellent coaches tend to work on fewer things in greater depth. Any good sales manager will know their people quite well; their strengths and their weaknesses. For most salespeople, coaching opportunities are numerous. It takes great discipline on the part of the coach to limit their attention to one or two key behaviors. By focusing on multiple areas you can confuse and often frustrate the salesperson, resulting in low overall effectiveness.

Too often, salespeople select a subject that is too broad for effective observation and coaching. They may say something like, “*I want to work on my discovery skills.*” The coach must more narrowly define the specific skill on which to work.

In preparation of the coaching trip the sales manager and seller should engage in a dialog to define the skills that the salesperson would like to develop. We call this agreeing on a *priority behavior*. The dialog might sound something like this:

Sales Manager: “Karen, our coaching trip is coming up in a few weeks. What skills would you like to work on?”

Seller: “I want to work on my discovery skills.”

Sales Manager: “Excellent choice, but it’s a broad subject. What specifically about your discovery skills is troubling you?”

Seller: “I’m having trouble getting to the real needs of my clients.”

Sales Manager: “From our training, what helps us get to the real needs of the buyer?”

Seller: “Asking problem and implication questions.”

Sales Manager: “Exactly right! Of those, which would you like more help with?”

Seller: “Well, implication questions. They seem more difficult for me.”

Sales Manager: “Perfect. Why don’t we work on that specific skill—asking implication questions? You have a few weeks before our coaching trip. Why don’t you work on setting up some calls where we can work on asking implication questions? Touch back with me in about a week so we can begin to plan the calls you’ve set up.”

Now that the seller and manager have selected the *priority behavior* of asking *implication questions*, they have clear expectations for the coaching trip. The seller sees that *priority behavior* as one which will promote greater professional development and will improve her effectiveness. The scope of the coaching session will be limited to developing that one skill.

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The stress level for the salesperson is relieved somewhat because she now knows what to expect and how to prepare. Coaching becomes more manageable as well. Limiting coaching to one behavior gives the coach a framework from which to help plan, observe during the call, and debrief after the call.

Observing the Call

Observing the call is the most important part of the coaching process. It is also the most difficult to execute effectively.

Sitting quietly in the second chair while your seller does the selling, especially if the call is not going well, seems nearly impossible for sales managers. Choosing the right accounts for coaching opportunities makes this process easier. Try to have your seller select low value accounts that are early in the sales cycle. While this cannot always be done, picking low impact accounts to call on creates a safe environment for both you and the seller for coaching to occur.

During your pre-trip planning session you and the seller have agreed on a priority behavior. While you will see many behaviors displayed in the call, discipline yourself to focus on the priority behavior. Observing properly, that single behavior alone will keep you busy enough in the call. Observe and take notes on both effective and ineffective uses of the behavior. How did the customer respond in each case? What was the resulting outcome? How might the call have gone differently? Observing not only the behavior but the effect it had on the customer will provide you with rich dialog in the post-call debrief, giving the seller excellent insight into what works and why.

Sometimes, simply ticking a set of behaviors provides unique and unexpected insights for both you and your seller. Try this on your next coaching call:

On a blank sheet of paper make two columns.

Column 1: "Giving Information."

Column 2: "Seeking Information and Testing Understanding."

Throughout the call, place a simple tick mark in the appropriate column each time your seller is engaged in either behavior. At the end of the call, tally up the totals.

You're likely to be surprised at how upside-down the ratio turns out to be. It is common to observe sales calls where the ratio is 6:1 Giving Information to Seeking Information. This data alone may provide you with enough coaching material for the next six months.

Post-Call Debrief

Average coaches often underestimate the discomfort of the person being coached. Your seller wants to perform well when they are with you and will be sensitive to what you say and how you say it. Create receptivity to your coaching by beginning with the positive. Find out what they believe went well and why. Instead of rehashing what went wrong, focus on excellent examples of the priority behavior and how the customer responded.

By remaining focused on the positive use of the behavior, the seller becomes far more conscious of what worked and why and is more likely to repeat the behavior when you're not around. Spending coaching time on the negative only exposes the seller to what to avoid and lacks the concrete evidence of what works.

If there are negative aspects of the call, draw that out by asking something like: *"If you were to run the call again, what might you do differently?"* This post-call debrief not only cements the learning from the previous call, but it also sets up expectations for the next call.

Documenting the Coaching Trip

Excellent coaches write coaching trip summaries because a well-crafted summary is equally beneficial to both coach and salesperson. For the coach, it becomes an historical record of development which is useful when writing annual development reviews and helping you remember from one quarter to the next what you have worked on. For the seller the trip report serves as a concrete review of the coach's observations and recommendations for their professional development. Some suggestions:

Complete the trip report and get it into the seller's hands within 48 hours of the coaching trip. Do it while the activities and discussions are still fresh in your mind. This quick turn-around demonstrates how much you care while also demonstrating a modeled behavior. Have you ever had a seller not get something back to a customer promptly?

Do not underestimate the discomfort of the person being coached. They want to perform well and be seen favorably by the boss. Again, create receptivity by stating the positive in your opening and closing paragraphs.

Never put anything in the coaching trip report that was not observed and discussed during your time together.

Typical format for a coaching trip report

- Paragraph one:** *Positive opening to create receptivity. May include the purpose of the trip, what went well, a few positive statistics on their territory performance, or encouragement for the coming quarter.*
- Paragraph two:** *Your observations of pre-call planning.*
- Paragraph three:** *Your observations of the priority behavior and highlights of what was coached.*
- Paragraph four:** *Review of goals from last quarter and setting of new goals for next quarter. These may be both task goals and developmental goals.*
- Paragraph five:** *Positive closing paragraph to reaffirm receptivity. This may be your vision of their future, their contributions to the team, the leadership they provide within their peer group, examples of accomplishment of which they are particularly proud.*

As you will see, you are coaching those sellers that have the highest potential for contributing to the team. Reinforcing the positive reduces the seller's anxiety about the document. This should not feel like an HR document to them, but rather observations from their mentor in a way that makes them eager for their next coaching opportunity with you.

When to Coach

An excellent sales manager once told me: *"A coaching opportunity presents itself any time I interact with my salespeople."* This statement is too true. Sales managers observe the behaviors of their people all the time, and the best ones leverage these observations to reinforce positive behavior or correct negative behavior. While this interactive coaching is beneficial, it lacks the sustainability that comes from a formal coaching session. So what does the formal coaching session look like and when should it be conducted?

For the sales force engaged in the major sale, a formal coaching trip should be conducted once per quarter. *"Wait a minute,"* you might say, *"I ride with my people all the time, probably twice a month, and I'm not giving that up!"* Let's distinguish between a field ride and a coaching trip.

A field ride is one where the purpose of your trip is to work with the seller in joint selling opportunities. Field rides are typically single day events and are characterized by leveraging your experience to help the salesperson sell the business. The field ride is one where your focus is primarily on the customer, whereas in the coaching trip, your focus is totally on the salesperson. These are separate and distinct events and should be articulated as such with your people. The two have completely different objectives.

The coaching trip is two days back-to-back, pre-planned well in advance. There are two main reasons why a coaching trip is two consecutive days. First of all, once you have agreed on a priority behavior, you need to observe that skill repeated over several iterations in order to coach improvement and see the development happen. Think of it as a “bucket of balls.” No golf coach is going to teach you the skill of getting out of a sand trap and then take you out for a round of 18 holes and hope you have occasion to hit one out of the sand trap. He’ll put you in the sand trap by the practice range with a bucket of balls and watch you hit fifty or so.

The same holds true for the coaching trip. If, as in the example above, you agreed with the seller to work on improving the use of *implication questions*, you will want to observe them in several sales calls. In the early calls you will observe and coach the skill, and hopefully in the later calls you will see that skill improving and can give reinforcing feedback to the positive improvement of the behavior.

The second reason for two days back-to-back is the simple fact that anyone can put one full day together for the boss. If you want to really know what’s going on in your seller’s territory, ride with them two days in a row.

Finally, schedule your coaching trips well in advance. It’s natural for anyone to want to perform well in front of the boss, and they’re going to want to be prepared. Springing a coaching trip on an unsuspecting salesperson is unfair and counterproductive. A coaching trip should be a two-day session scheduled a quarter in advance, giving both parties time to agree on the dates and objectives for the trip and giving the salesperson the time they need to set up the kind of calls that will bring out the skills to be coached.

Summary

While coaching has changed dramatically as the dynamics of each marketplace shift, the role of the sales manager will see even more dramatic change. Applying the principles outlined in this paper places you on the leading edge of that change. You occupy the pivotal role and can, if you choose, create lasting and identifiable positive change that benefits your organization.

Each of us have benefited from someone who had lasting and identifiable impact on our lives and helped shape who we are. It may have been a teacher, a sports coach, clergy, or a parent. Someone saw something in you that you didn’t know was there and helped to bring out the best you have to offer. As a sales manager and coach, you have the opportunity to be remembered that way—by your salespeople.

Good Coaching!

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With more than three decades of delivering client results, Huthwaite is the leading sales performance and change management firm. As pioneers in the application of behavioral research and analysis to improving sales effectiveness, we impart the skills and processes to drive lasting change and measurable business outcomes.

Building upon our prestigious research legacy, broad subject matter expertise and success-based sales models, Huthwaite's approach integrates implementation and training strategies to cultivate critical competence across the client enterprise. In short, we help clients diagnose challenges, define success, prepare for change, implement sales performance solutions and support ongoing improvement. By continually revisiting this process, we empower clients to adapt to changing markets, anticipate new needs and stay ahead of the competition.

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