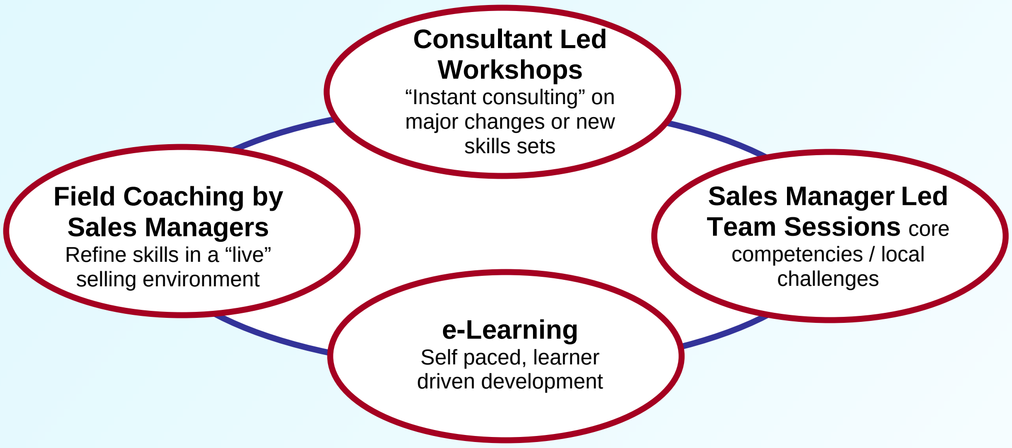
THE SALES MANAGER'S COACHING ROLE

Whilst most sales managers recognise their role in developing and training their sales people, very few approach it rigorously. Yet, without this critical activity, the thrust of field management is lost. We are attempting to achieve results through people. We must know how they are trying to obtain these results and help them develop the knowledge, skills and attitudes to do so.

Field Coaching means spending one or two days per month in the field with each sales person to observe and add value. Coaching is strongest when complemented by other training mechanisms.

Figure 1.



1. THE PURPOSE OF COACHING SALES PEOPLE

- ❑ To ensure that each sales person gets **success and satisfaction** from the job
- ❑ To ensure the right work habits and disciplines are in place
- ❑ To **assess performance in the field** in the context of an agreed job description and known standards.
- ❑ To **recognise strengths**, success and effort and to give **praise** where and when due
- ❑ To further develop existing strengths and abilities
- ❑ To identify **relevant weaknesses**, gain acceptance of them and then coach in appropriate skills and technique
- ❑ To encourage and guide the process of **self development**
- ❑ To identify training requirements which cannot be met in the field and to action them.
- ❑ To measure and recognise improvement.

2. GUIDELINES FOR SALES MANAGERS

- **Put aside sufficient time to go out with your sales people.** For example, once every 2-4 weeks for those with less than two years with the company, and once every 4-6 weeks for those with more experience. The **whole day** should be devoted to the activity.

- **Spend time with everyone**, including the most experienced. Everyone can learn something and, if what they do works well, then let's **share it** with the team and build on our total strengths.

- **Set the date in advance** – no springing surprises at nine o'clock in the morning. Nominate whom you want to visit or choose a day with a specific run-list.

- **Know your stuff!** During the day, you must give the sales person tips on how to improve his/her performance. The whole point about knowing how they are doing is to **help them do better**. You must understand the company's selling process and be able to demonstrate it if you are to be a credible trainer.

- **The sales person' job description is the key.** Major areas for observation and coaching may include:

  - selling techniques
  - customer knowledge
  - call planning – aiming higher
  - work organization – territory planning, time management
  - product knowledge
  - reporting – record cards, etc
  - company policies and procedures.

- At the start of the day, look up the **last Daily Work Review** notes so that we can identify where improvements have taken place versus priorities set last visit.

- **Use the 10 Step technique** for pre and post call coaching. We want our sales people to plan and review in the same disciplined way (see next 2 sections).

- **Be selective**. There are always a number of things you might want to discuss after a call. Lead discussion towards the one or two issues that are most important to performance improvement.

- **Above all don't "tell".** Always allow people to solve their own problems. Guide, suggest or prompt, but remember, if they come up with the right solution, it will be more likely to succeed than any solution you suggest. Questions, not assertions are your most powerful training tool.

3. THE TEN STEP COACHING TECHNIQUE

The ten steps in Figure 2 below cover the pre call plan, the call itself and a post call review and coaching processes.

They are designed to instil a **thinking pattern** that the sales person will use on every call.

Figure 2:

The 10 Step Coaching Process

For each call...

1.	Review the situation	☑
2.	Review call objectives	☑
3.	Review the sales plan	☑
4.	Final Pre sale check	☑
5.	In the call, listen and observe	☑
6.	Congratulate, briefly	☑
7.	Review versus objectives	☑
8.	Reinforce the positives	☑
9.	Agree improvements	☑
10.	Objectives for the next call onto the record card	☑

4. QUESTIONS HOLD THE KEY

THIS IS A QUESTIONING PROCESS. We want sales people to ask themselves these types of questions when we're **not** with them. They are generally **"open probe" questions** (who, what, where, when, why, how) which demand a considered response.

PRE SALE

1. Situation

- What are the key issues with this customer?
- What have you achieved here recently?
- What did you discuss in the last call?
- What objectives did you carry forward on your record card for today's call?

2. Objectives

- What do you intend to achieve today? Why?
- What else could you aim for / how could you aim any higher?

3. Sales Plan

- How do you intend to achieve your objectives? (Probe: Questions, Benefits, Objections, Negotiable issues, etc)?

4. Final Check

- What sales aids will you use? Why?
- Will you need any help from me? Why? How?

POST SALE

7. Achievement

- What did you achieve versus the plan?
- How do you feel it went? Why?

8. Positives

- What did you do well?
- (If limited spontaneous response, probe)
  - How do you feel she responded to your point on …..?
  - When did she really start to come around?

9. Improvements

- If you did it again, **would you change anything?** What? Why
- Were there any **alternatives** you could have used? What? When? Why?
- (If there **were** points you want to discuss and questions don't bring them out, probe …)
  - What options did you have when she said ….?
  - How else might you have handled that objection on stock quantity?

10. Action

- Which points of technique are you going to work on as a result of that call?
- What are your **next objectives** for that customer?
- How else can I help you?

3. A MANAGER'S BEHAVIOUR DURING THE COACHING CALL

4.1 The Manager's Role is to Observe

The hardest thing for most Managers to do on coaching field calls is to shut up! We don't want one order saved by the manager, but hundreds taken by the sales person. So, managers must be prepared to let sales people make mistakes. That is the best way of learning. **If it really is a critical call to the business then don't use it as a coaching call** unless the sales person insists on a "solo" effort.

If the manager interrupts a call, or intervenes to save it, the sales person will not learn as much, may lose confidence, and just conceivably might have got it right anyway (if only the manager had shut up).

4.2 Deflecting Customer Questions

But what happens if the customer wants to involve the manager? If it's a question that the manager can answer, he should first ask himself whether he should have provided the sales person with the information so that he could answer it! The response to the customer could be:

> *"I would like to discuss that with you, but I don't want to interrupt Chris's call, can we get back to that at the end?"*

If it is a question Chris can answer anyway, the response might be:

> *"Fred, Chris is the one looking after your business, so I'll ask him to respond. After all, he certainly knows your business better than I do."*

4.3 Explaining the Manager's Presence

What do we tell the customer about why the manager is there? The Sales person should say for example:

> *You know Graeme my Manager, don't you? He makes a point of getting out into the field regularly with us to keep in touch with the real world",* OR *"to see what's happening in the market place."*

Beware: Often we come across customers who guess what the manager's role is and will "play to the audience" by either praising the sales person or giving him/her a really tough time. Don't be taken in by it.

4.4 Demonstration Calls

If you want to demonstrate how to handle a particular type of call, then plan it **in advance**. You might want to demonstrate, for example:

- How to qualify a new customer's needs
- How to sell in a new initiative
- How to handle a difficult customer

If you do this, plan the call together, demonstrate and, afterwards, ask the sales person to lead you through the post call steps (6-10).

5. SUMMARY OF KEY POINTS

1. The manager's role is to get results through people

2. Field time with all team members allows you to:

   - Cross fertilise good ideas / techniques
   - Reinforce strengths
   - Correct the weaknesses that inevitable develop in a tough selling environment

3. Use the "10 Step Coaching Technique"

   - The aim is to establish habits that will continue when you are not there.

4. Questions hold the key
   - Make people think it through for themselves! Don't "tell", simply add value and summarise.

5. You fail if you can't add value

   - Always have solutions

6. Be selective

   - Talk through just one or two key issues after each call

7. Be willing to demonstrate

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