



Addressing Gaps in Call Coaching

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Presented by

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About The Sales Management Association

A global, cross-industry professional association for sales operations and sales management.

Focused in providing research, case studies, training, peer networking, and professional development to our membership.

Fostering a community of thought-leaders, service providers, academics, and practitioners.

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Today's Speaker



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SALES
MANAGEMENT
ASSOCIATION

Addressing Gaps In Call Coaching



LAUREN
BAILEY & President

FACTOR8
Sales Training Designed By Sales Leaders

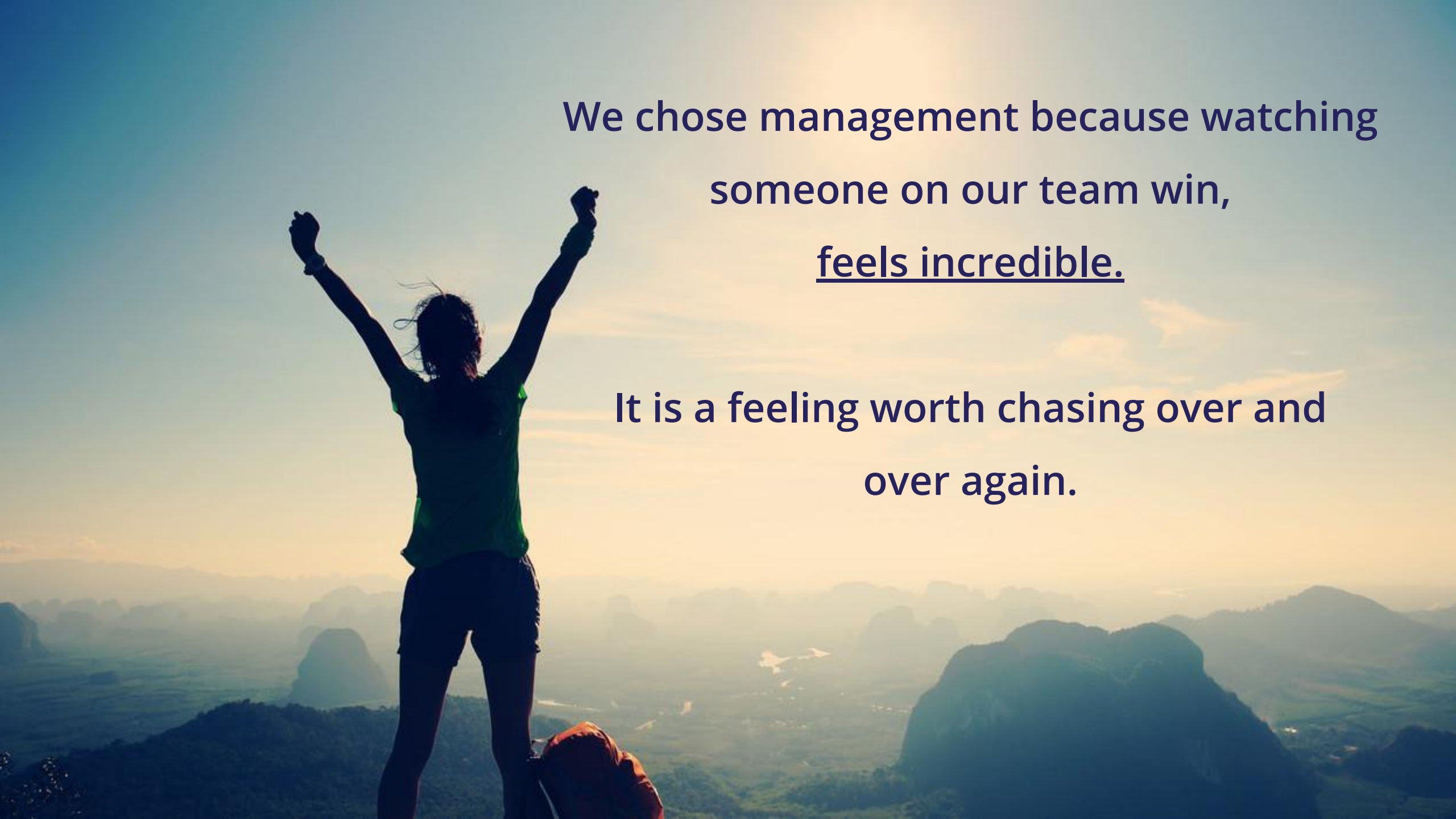
#GirlsClub

sales
THE BAR

ASK YOURSELF:

*Who has done the most to develop
me and my career?*

**WHO WOULD SAY
THAT ABOUT ME?**

A silhouette of a person standing on a mountain peak, arms raised in a 'V' shape, celebrating. The person is wearing a green shirt and dark shorts. The background shows a vast, hazy mountain range under a bright, hazy sky. The sun is low on the horizon, creating a warm, golden glow. The text is overlaid on the right side of the image.

We chose management because watching
someone on our team win,
feels incredible.

It is a feeling worth chasing over and
over again.

60%

OF NEW MANAGERS
FAIL WITHIN 24
MONTHS.

CEB 2017

SALES MANAGERS

#1 WORST SKILL:

CALL COACHING

- Sales Executive Council

REPS VOTE WITH THEIR EMPLOYMENT



50%

OF EMPLOYEES SAY
THEIR BOSS IS THE
REASON THEY QUIT.

GALLUP



76% of Managers
say they coach 3-6+ hours / month.

Only 48%

of reps agreed with this statistic.

Joint ExecVision / Bridge Group Study

COACHING VS. CALL (SKILL) COACHING



COACHING

Development
conversation

Any level

Focuses on improvement

Positive

Largely conducted
with questions

CALL COACHING

Call is present – recorded,
Y-jacked, observed

Rep and Manager give
feedback on call

Maximum of 3:1
(or it's training)

Everyone participates
in equal measure

Documented in
some fashion



WHY IMPROVE COACHING?

AVERAGE (NORMAL) COACHING
= 55% QUOTA

GREAT COACHING PROGRAMS
= 85% QUOTA

- Sales Executive Council

WHAT MAKES IT GREAT COACHING? The 4 S's



STRATEGY



STRUCTURE



SKILLS



SYSTEMS

COACH THE REP

NOT THE DEAL

WHERE WE GO WRONG...

COACH-ASTROPHIES TO AVOID

A person in a white shirt is resting their head on a laptop screen, looking exhausted. The laptop is open on a desk, and the person's hands are clasped over the screen. A pair of glasses and a glass of water are visible on the desk to the left.

1

DEBBIE DOWNER

2

I DO ALL THE TALKING

3

BE LIKE ME

4

THE LAUNDRY LIST

5

NO TIME

6

THE HAMPSER WHEEL



COACH-ASTROPHE #1: **DEBBIE DOWNER**



Good Coaching Checks TWO Boxes

Call coaching is a development opportunity and an engagement opportunity



REPS SHOULD LEAVE CALL COACHING FEELING LIKE A SUPERHERO



5:1



COACH-ASTROPHE #2: I DO ALL THE TALKING



USE A STANDARD MEETING FRAMEWORK

The COACHN Model



C

O

A

C

H

N



TRY THE COACHN MODEL FOR ANY MEETING!

C	Clarify Expectations	Last time you decided to work on your intros and I know we have a few calls scored. Let's see how you're improving.
O	Observed Behavior	I heard your new intro in most of these clips
A	Ask Questions	How did it feel using the new technique? Does the customer's reaction sound any different to you? Where could we improve?
C	Commit to Actions	What can you do to focus in on that skill?
H	How Can I Help	Want to role play it?
N	Next Steps	So, we'll each bring a graded call to our next session in 2 weeks and we'll focus on rapport building. Will you send the invite by end of day?



COACH-ASTROPHE #3: **BE LIKE ME**



COACHES SPEAK IN _____

LEARN TO SPEAK "COACH"

X

Pushed right past gatekeeper without gaining any information



✓

What made you decide to skip over the gatekeeper?

X

Horrible Intro. Way too long!!



✓

How did the DM react to your introduction? Do you think he was fully tuned in at the end?

X

Totally threw up features on the DM



✓

X

Walked RIGHT PAST a buying sign!



✓

X

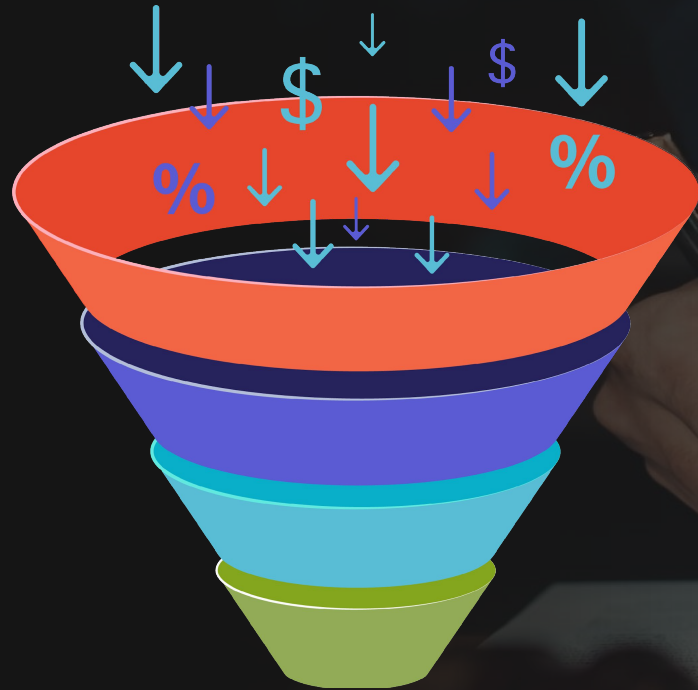
Shut down at the objection. Just answer his question!!



✓

TIP: Think of your Rep as your Customer!

NO LEADING THE WITNESS YOUR HONOR



“Wouldn’t you agree that....” Doesn’t count as a question!

BEATING #3: BE LIKE ME

USE A STANDARD COACHING FORM

Recorded / Side by Side			ATTEMPT			RESULTS			RATING			
Talk Tracks (Objective)		Description of Skill or Action	Attempted	NOT Attempted	N/A	Results Achieved			Achieved	Work	Competent	Skilled
			✓	✓	N/A				✓	1	2	3
Before Decision Maker	Pre-Call Plan	Prepared with call goal and first 5 questions				Rep began confidently and with direction						
	Research	Knew customer buying history and last inquiry				Leveraged knowledge to gain interest						
	Leveraged Gatekeeper	Used rapport skills to gain access and information				Rep gained access to DM and/or 2 pieces of information						
	Voicemails	Used techniques to capture attention and prompt call back				Would compel me to call back						
With the Decision Maker	Call Intro	Used Lever or value to engage customer right away				Intro captured DM's attention, call was not cut off in the next 2 minutes						
	Exploring	Uncovered situation and/or problem				Got details of situation that can lead to company opportunity						
		Uncovered pain in the problem				Got details problem / pain that can help company solve the problem and entice customer to solve the problem						
		Uncovered & confirmed priorities of what the contact / DM & end users value about product, company, service, other				Contact's prioritized values _____ Other users / contacts values: _____						
		Uncovered product details (usage, specs) to enable company product match				Rep can identify potential product solutions after call						
		Uncovered buying process and details needed to uncover steps for a win				Found DM's, purchaser, influencer, DM, approval process						
		Uncovered potential barriers including competition, price, timeline, other				Barriers are:						
		Asked for 1 or more growth opp's: + product or NEW product, family, site, contact				Growth area to explore:						

- ✓ Sets Expectations
- ✓ Consistency For Team
- ✓ Consistency Across Teams
- ✓ Rep Trends
- ✓ Team Trends
- ✓ Floor Trends
- ✓ Training Retention
- ✓ Coach-astrophe Killer



COACH-ASTROPHE #4: **THE LAUNDRY LIST**



DECIDING WHAT TO COACH

X	Pushed right past gatekeeper without gaining any information
X	Horrible Intro. Way too long!!
X	Totally threw up features on the DM
X	Walked RIGHT PAST a buying sign!
X	Shut down at the objection. Just answer his question!!
X	_____



✓	What made you decide to skip over the gatekeeper?
✓	How did the DM react to your introduction? Do you think he was fully tuned in at the end?
✓	_____
✓	_____
✓	_____
✓	_____

IMPACT CHOICES:

REP = Rep Choice

\$ALE = Anything prevent a sale?

CALL = What killed the call?

CUSTOMER = Will they take our next call?

RULE OF THUMB:



**WHEN THE
REP GIVES:**

IT LIVES

RULE OF THUMB:



IF YOU DECIDE:

**WATCH IT
DIE**



COACH-ASTROPHE #5: **NO TIME**



SET A COACHING TIME GOAL

Your Monthly Coaching Time:

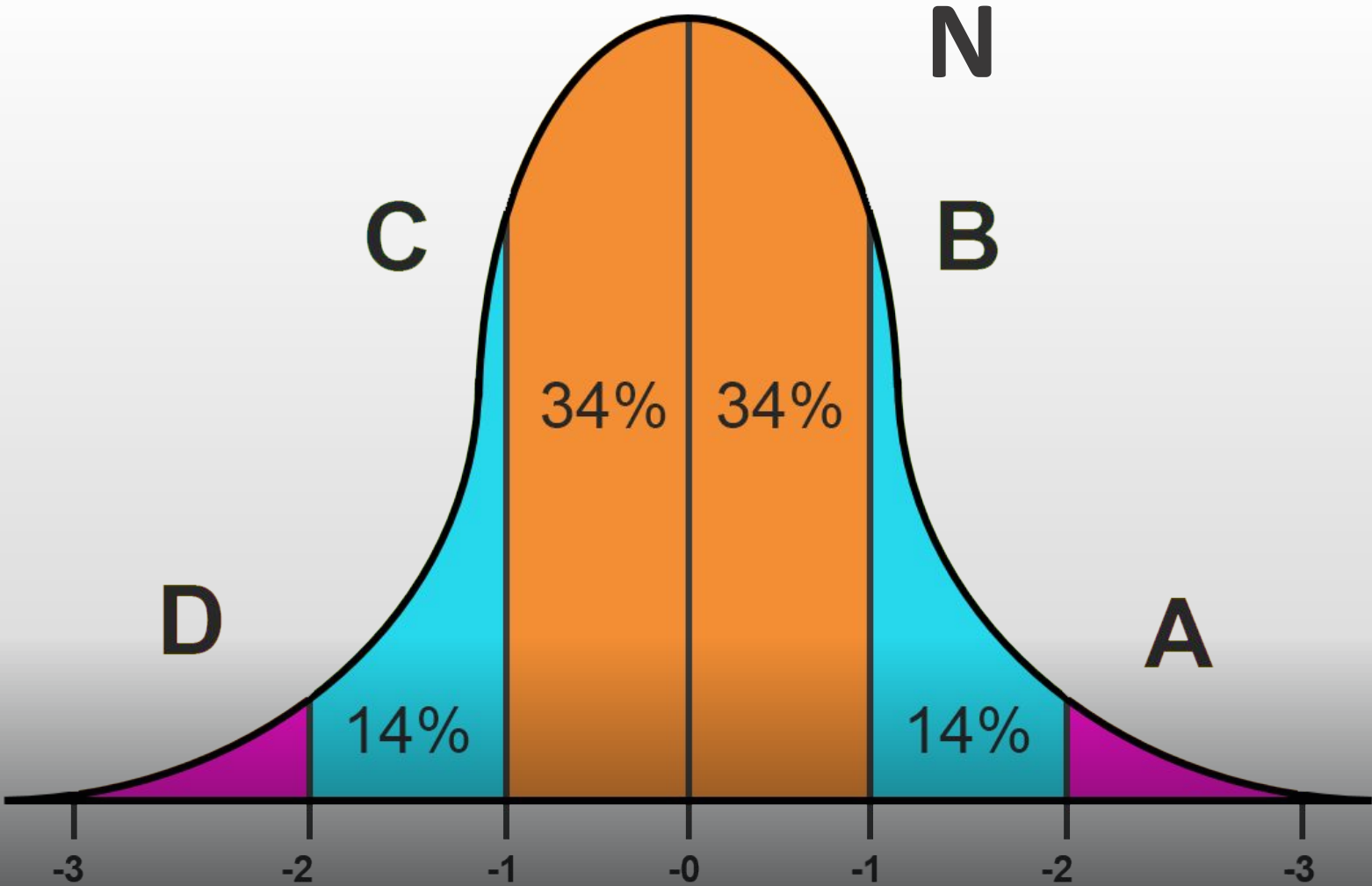
1 = 8-10 hours (30 min / day)

2 = 15-20 hours (1 hr / day)

3 = 34-40 hours (2 hrs / day)

4 = 52-56 hours (3 hrs / day)





Who is your highest call coaching priority?



TIPS FOR SUCCESS

- ✓ Schedule the middle 2 weeks first. Do half in week 1, Do none EOM / EOQ
- ✓ Schedule Reps in priority order (B's first!)
- ✓ Leave at least 4 hours / day unscheduled (emails, floor time, escalations, etc.)
- ✓ Let your Reps know your plan! Coordinate a convenient time
- ✓ After a trial run, send Reps' meeting invitations including time & location
- ✓ UNDER vs. overschedule. Never no show or cancel!

PROTECTING COACHING TIME



Push updates into 1:1 meetings or coaching time (*"I have 3 seconds right now or 45 min in our meeting on Tuesday"*)

Ask for urgency / deadlines. Tell them you have scheduled rep coaching.

"Can you hit me back in 15 min?" = Rep solves it

LEADERS – REMOVE BARRIERS



Give more notice on meetings, requests



Bust managers for NOT asking about deadlines / urgency



Invest in tools: Chorus, Gong, Exec Vision / Ambition, Level 11. / AAISP, Factor 8 + Learn higher-level features.



Identify skill-gap trends and move off Managers' plates into team training



Set coaching time expectations (strategically)



COACH-ASTROPHE #6: **REP SKILL HAMPSTER WHEEL**



BEATING "THE HAMSTER WHEEL"

W.I.N.S. REP COACHING FORM

Name: _____ Date: _____

Call Strengths:

W.I.N.S. Areas (What I Need to Succeed):

Performance Notes & Goals– How Should This Impact My Sales Performance?

My Commitments - Actions I will take to exceed expectations on calls:

	Action Item	Due By	Comments
1			
2			
3			

Director Commitments – Actions my Director will take to assist me:

2			
3			

Rep Signature: _____ Director Signature: _____

- ✓ Rep Fills Out
- ✓ Rep Owns
- ✓ Paper or Electronic

What **I**Need to **S**ucceed

- ✓ Tracks Focus Areas
- ✓ Deepens Commitments
- ✓ Gains Mutual Agreements
- ✓ HR Paper Trail

TIP:

Resist owning
this form!

VIRTUAL CALL COACHING TIPS

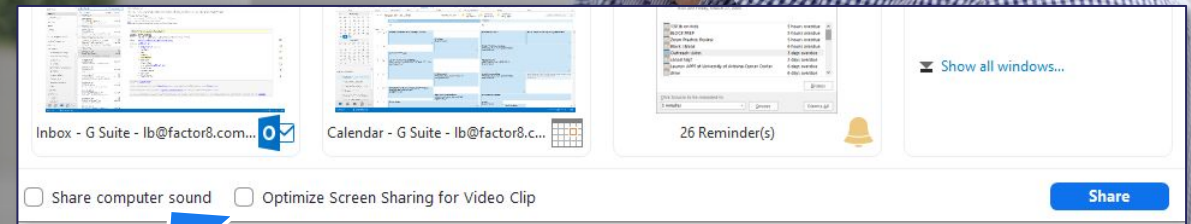
1. Schedule it – drive by's won't work now!
2. Get strategic – WHY and WHAT are you coaching? Goal?
3. Define good in a scorecard / keyword tracker
4. Use systems to quickly surface good / bad calls
5. Combine synchronous (live) and asynchronous (recording)

I Have Recordings:

1. Download calls first for better playback (rep)
2. Zoom video works best for playing calls.
3. Pick calls BEFORE coaching session (rep)
4. Choose call sections based on goal (rep)

I Don't Have Recordings:

1. Schedule joint calls (stay on mute) + post-call coaching
2. Role play (2:1 for triad coaching)



5 atta boys

1 improvement item

5 questions from the coach

2X chance of implementation if THEIR idea

1.5 average coaching sessions / month / rep

0 action items on your list

Let's Connect!



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Your Questions



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Thank You