

By Value

rates for closed opportunities?

with close dates in the previous 30 days.

Opportunity Count

86

69%

59

56%

33

67%

22

82%

18

% Conversion to Next

69%

56%

Conversion % from Top

N/A

69%

38%

26%

21%

Creating a Metrics-Based Sales Coaching Model

By Jason Jordan, Zorian Rotenberg and Mike Baker

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Meet the Authors



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Introduction

If you ask a Sales Manager how his performance is evaluated, he'll probably give some arrangement of the following questions: Is the company becoming more profitable? Is his team winning more deals? Is the product gaining market share?

While these questions are important, they ignore an essential detail: **these metrics are not under his direct control**. In fact, the Sales Manager really can't manage them at all.

Taken even further: **Sales Managers cannot manage most of the sales metrics their company's track and hold them accountable for**.

How do we know this? A few years ago, Vantage Point and the Sales Education Foundation (of which Jason is a partner) conducted an extensive study of sales organizations around the country. All told, the study unearthed 306 distinct metrics that these organizations used to measure sales performance. Some of these metrics were only important to a single organization, while others were listed by nearly every sales team we studied. The specific metrics tracked everything from top-line revenue all the way down to the number of sales calls made per day.

Because our question was how sales leaders could better manage their teams to achieve results, we went through every single one of these 306 metrics and asked a simple question: **"Can this be managed?"**

Through this analysis, we learned that there are 3 main types of sales metrics, each with a different level of manageability:

1. **Business Results** are the metrics most Sales VPs think they are really being judged by and are the culmination of an entire organization's efforts: market share, bookings, revenue churn, etc. *Business Results cannot be directly managed.*
2. **Sales Objectives** are the specific targets that an organization asks a sales force to reach. Things like acquiring certain customers and improving customer retention. *Sales Objectives can only be influenced, not directly managed.*

3. **Sales Activities** are what most Sales Managers are looking for – things that they can actually manage: # of dials per rep, # of reps per manager, \$ spent on training, etc. These metrics accounted for 19% of the total 306 and are considered “highly manageable” and are therefore where all Sales Managers should start if they’re hoping to achieve sales results.

Of course, the other two categories of metrics are important, but they are lagging indicators. **Business Results and Sales Objectives today are the result of Sales Activities last quarter.**

So we know that in order to achieve Business Results, Sales Managers must start by changing the way they manage Sales Activities. But this just raises the obvious question: **How can a Sales Managers improve his or her reps’ Sales Activities?**

The answer is using metrics-driven sales coaching and an “execution coaching model”.

This eBook will help Sales Managers adopt these tactics by:

1. Detailing the common problems with sales coaching
2. Laying out a blueprint for an execution coaching model
3. Explaining the fundamentals of coaching by the numbers

Chapter // 1

The Problems with Sales Coaching

Summary

As we explained in the introduction, coaching is the most effective way for Sales Managers to improve the performance of their reps. This will not come as a surprise to most sales leaders, and yet there is still a disconnect between how Sales Managers think about coaching and how they actually incorporate coaching into their daily, weekly and monthly routines. The reason for this disparity is due to 3 main problems of sales coaching, which we will flesh out in this chapter:

- Sales Managers don't spend enough time coaching
- Most Sales Managers aren't coaching by the numbers
- Traditional "alignment" coaching models aren't sales-specific

Problem #1: Sales Managers Don't Spend Enough Time Coaching

Here's a question we hear all the time: **How much time should a Sales Manager devote purely to coaching?**

Most research suggests that Sales Managers should spend at least 4 hours per month per rep coaching. In other words, each rep should receive about 1 hour of dedicated coaching time with his or her manager each week. Simple enough, right?

The problem is that very few Sales Managers actually meet this benchmark. In our research, we found that for most Sales Managers, coaching exists in a special realm where they keep track of the things they should be doing but seldom do. This isn't due to incompetence or neglect, it's simply a byproduct of being a Sales Manager in a busy world: **coaching and leadership are nice-to-have's, not need-to-have's.**

Leadership doesn't happen first thing Monday morning, but team meetings certainly do. And coaching might not happen this Friday afternoon, but you can bet the sales forecast will. Sales managers live in a tactical world, and in a tactical world it's all too easy to lose sight of the bigger-picture, more strategic issues. A constant refrain from Sales Managers is "I don't have time to sharpen the axe because I'm too busy chopping wood!"

Too often, sales coaching is the first thing to get cut from a busy schedule. But shelving sales coaching – sharpening your reps' axes – because you have too many day-to-day activities – chopping wood – is natural, but not wise. Ongoing coaching is essential for long-term success, and Sales Managers who dismiss it will likely see results suffer down the road.

Problem #2: Most Sales Coaches Aren't Coaching by the Numbers

If they don't have sufficient time set aside specifically for training, many Sales Managers fall back on gut-based coaching habits. This makes sense: If there's not enough time in the week for coaching, there certainly isn't enough time to truly dig deep into the numbers and create tailored, metrics-backed coaching plans for every single rep on their team. Instead, they have their reps explain their challenges and then come up with a few anecdote-based suggestions to help the reps improve.

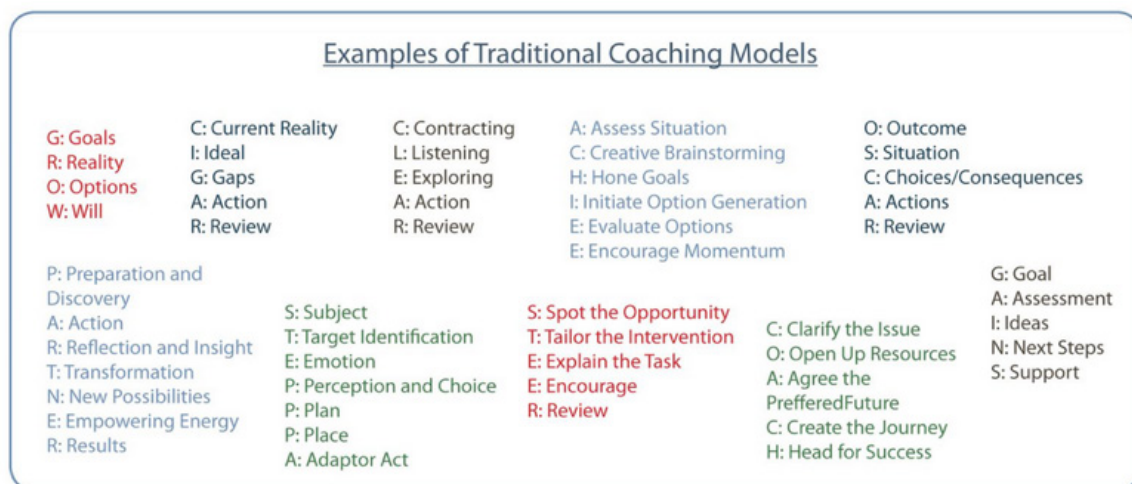
It's easy to see why this strategy backfires. Contrary to the popular saying, practice does not make perfect – **practice makes permanent**. So if you're using your gut to coach your sales team, you could be reinforcing bad habits. Yes, you will be coaching your reps – coaching them to fail.

Later in this eBook, we will provide a simple, repeatable blueprint you can follow to ensure that you're not only coaching your sales team, but coaching them in the right way (and using the **right sales metrics**) to ensure they achieve the right results.

Problem #3: Traditional “Alignment” Coaching Models aren’t Sales-Specific

Even when Sales Managers do carve out regular time each week to coach their team, they often rely on overly general and outdated coaching models. These models, which are used almost interchangeably in such far-flung industries as sports and education, are great at presenting an easy-to-remember system for targeting results, but they often fall short in actually achieving those results.

Here are just a few examples of common coaching models that Sales Managers use to coach their reps:



These models are often referred to as “alignment models” because they help Sales Managers align day-to-day activities with a team’s desired outcomes. In the context of the 3 categories of metrics we explained earlier, these **alignment coaching models help teams work backwards from the Business Result they desire** – such as revenue or market share – and **tie it to the specific Activities** – such as dials or meetings – that can influence it. While alignment coaching models are helpful in a general sense, they are not perfectly suited for the sales environment, which has a unique set of demands and objectives.



"When it's time for managers and their sellers to reconsider the right path to success, they need more than a generic acronym. They need something that defines an explicit path to quota."

Jason Jordan, Author of 'Cracking The Sales Management Code'

One reason they fail in sales settings is because **alignment models are designed for periodic intervention and planning** when, in fact, sales coaching is most effective when it is naturally and consistently folded into a sales rep's routine. Too often, the models shown above are used to press 'pause' on the salesperson's daily activities of making calls, chasing deals, and growing accounts. These models are intended to force deliberation so the sales person can objectively re-evaluate their path to success. The result is that coaching typically takes place outside of the day-to-day fray, and even then only periodically and on an ad hoc basis.

This is not the ideal scenario for sales coaching, which is most effective when it takes place within the context of reps' calls, deals, and accounts – not high above them. **Sales coaching needs to be a structured, daily occurrence that systematically improves the efficiency and effectiveness of a sales rep's activities**, so the impact can be felt in real-time. Only then can coaching make the quantifiable impact that we all expect from it.

One of the key insights from our research and work with clients is that Sales Managers need more structure in their coaching. It's difficult to coach a salesperson when the seller's hair is on fire. Unless some structure is given to a Sales Manager's week, ad hoc interactions will populate the day.

In a sales environment without a structured coaching cadence, coaching is rare and unpredictable. For example, we have spent a significant amount of time observing manager-seller interactions, and we've found that little coaching takes place in ad hoc discussions. Such discussions are hurried interruptions where the goal is to solve immediate problems, not to look farther down the road to incremental improvement. Effective sales coaching is best done in a formal environment with an agenda and two parties who are prepared for the conversation.

The idea that sales coaching must be structured, continual and used to improve specific activities is the basis of what we call the “execution coaching model,” and is the topic of the next chapter. In it, we lay out a simple and effective way to take traditional alignment coaching models and tether them to a sales-specific context.

Chapter // 2

Creating an Execution Coaching Model

Summary

Alignment models are an important part of a sales coaching model, but, as we just saw, they are only one part. The other part is what ties alignment coaching models to the sales context, and is something we call the “execution model.” Execution coaching is designed to bring the aligned sales activities to life and drive the attainment of the Sales Objectives and Business Results with a simple 3-step process:

- Monitor the chosen **activities**
- Within a management **rhythm**
- Using structured **conversations**

What is an Execution Model?

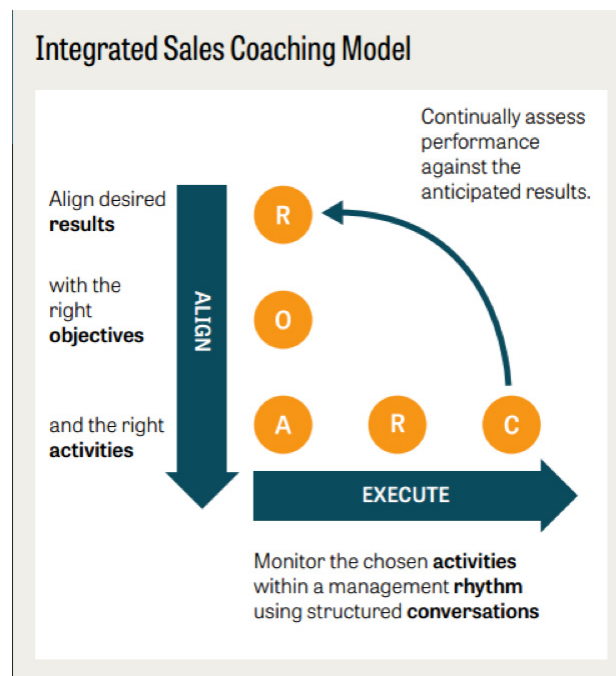
As we mentioned in the previous chapter, alignment coaching models fall short because they don't address the most critical determinant of sales performance and the result that senior executives most want: consistent execution in the field.

For that you need an execution coaching model.

The best sales coaches are deliberate about setting aside time in their schedules to have detailed interactions with their reps about sales activities and execution. This is the ultimate aim of the execution coaching model: **to create a process for having regular conversations with reps, and for making these conversations as specific, data-driven, and actionable as possible so reps tangibly improve their sales execution.**

So, while traditional alignment models work backwards from Business Results to pinpoint the specific Sales Activities that produce them, execution models take those Sales Activities and bring them to life through targeted coaching conversations.

Visually, a combined “alignment” and “execution” sales model looks something like this:



Combining alignment and execution models ensures that the activities a Sales Manager deems essential for achieving Business Results are the same activities that he discusses with his reps in their regularly scheduled, highly structured conversations. **When the ROA alignment model is combined with the ARC execution model, a comprehensive coaching framework is formed that ensures both alignment and execution take place in an integrated fashion.**

In short, our Integrated Sales Coaching Model works by identifying primary Business Results (a specific \$ revenue goal, for example), working backwards to identify the right Sales Activities from their reps to achieve this result (better conversations, perhaps) and then creating and carrying out a coaching rhythm that ensures execution in the field.

But this misses one essential question: How do Sales Managers know which activities to coach their reps on? All reps need improvement and targeted coaching in different areas, so Sales Managers can't simply provide one-size-fits-all coaching to their entire team in the hopes of improving across-the-board execution.

They must instead work on a rep-by-rep basis to find the individual activities that are most in need of improvement.

In the next chapter, we lay out a simple coaching methodology designed to help sales managers use data to identify the one skill each rep needs to improve so they can develop a tailored coaching plan to help them improve it.

Chapter // 3

Coaching by the Numbers

Summary

With execution coaching models, Sales Managers finally have a model designed specifically to help them achieve Business Results in the sales context. But success with an execution model hinges on correctly identifying the Sales Activities that will drive Business Results and coaching reps to improve these activities. So how do you know which activities to focus on for each rep? And how can you coach them once you have identified the activities most in need of improvement?

In this chapter, we provide the **most important metrics** for sales coaching and lay out a simple, repeatable method for using **rep-specific sales data to help you pinpoint the single most important skill to coach each rep on**. After that, we give you a blueprint for using structured conversations to work with each rep until the selected skill improves:

- Identifying the Sales Activity that needs to be addressed
- Digging in to find the root cause
- Creating an execution coaching plan



"If sales leaders had an interconnected system of meaningful performance metrics, like their finance or operations peers do, they could enjoy the same level of control and manageability as these other business functions."

Jason Jordan, Author of 'Cracking The Sales Management Code'

No rep is perfectly effective in all areas. Put another way: all reps have opportunities for improvement in different areas. The question for all Sales Managers, then, is "Which skill most urgently needs improving?" **To identify the right skill to work on for a given rep, a Sales Manager must lean heavily on sales metrics and data.**

In the introduction of this eBook, we mentioned how our research revealed about 60 common sales metrics that can be directly managed by Sales Managers. These metrics are called Sales Activities and include everything from # of dials reps are expected to make to the # of opportunities the average rep should work at one time. All of these Sales Activities contribute to your Business Results, but you cannot coach all of your reps to improve them all at any one time. Instead you must identify the one activity or skill that each individual rep needs to improve.

In the first section of this chapter we look at the best way to diagnose the right skill to work on (always keeping in mind the Business Results you want to achieve) for outbound reps, who tend to rely on activities like calls and emails to achieve their goals. After that, we will offer the right metrics to guide the coaching of Inside Sales Reps, who spend most of their time managing opportunities, demoing the product and closing deals.

Diagnosing the Right Skill for Business Development Reps

Perhaps more than anyone else on your sales team, Business Development Reps (BDRs) rely on baseline activities like calls and connects to reach their goals. At first glance, this might make it seem simple to get more from your prospecting team: More dials!

Not so fast. More than likely, an outbound prospector's main shortcoming goes beyond simply failing to make enough dials. If you want your sales reps to execute effectively and help your team achieve its desired Business Results, you need to use data to pinpoint the issue that is giving them the most difficulty.

So, for example, if the data suggests that one of your BDRs isn't creating enough opportunities, you must drill down identify the root causes that are producing this overly general shortcoming. Is this rep investing too much time and effort into unqualified opportunities? Is she struggling with time management? Is that rep paralyzed by a fear of picking up the phone and making calls? Is she lacking in personal goals and motivation?

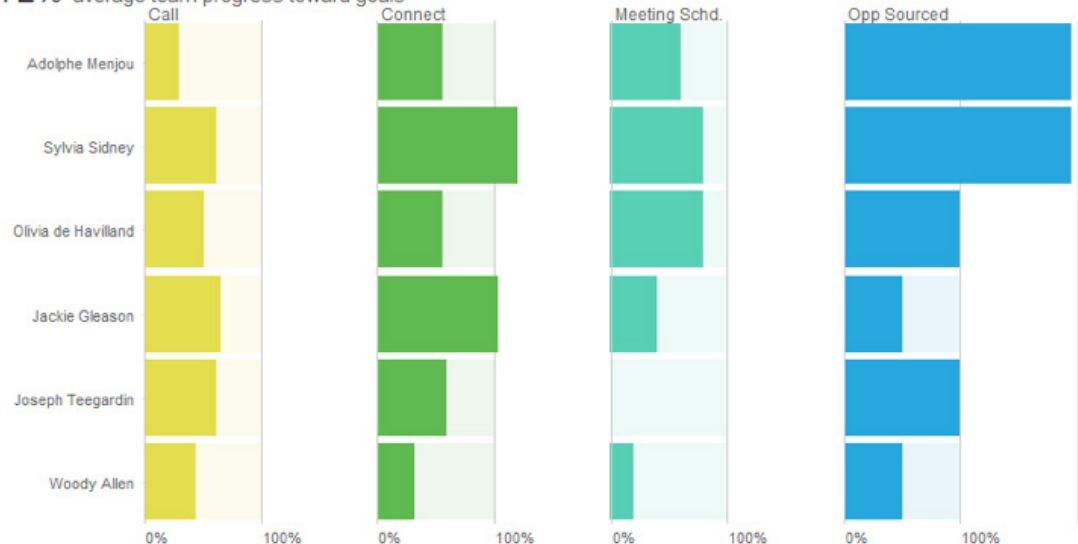
How do you identify the area that is most in need of coaching? The most effective way is to track activities by rep and see where particular reps are coming up short, either compared to other members of the team or compared to their own goals.

Below is an example activity analysis that shows exactly where each rep stands in terms of their activity goals.

Activities vs. Goals

How are we performing versus activity goals?

72% average team progress toward goals



Take Joseph Teegardin, for example. Clearly he needs to improve his ability to schedule meetings with prospects. Although he performed relatively well in the other areas – calls, connects and opportunities sourced – he did not schedule a single meeting this selling period and is well behind the other reps and his own goal.

Once you've identified this skill to improve through targeted coaching, what do you do?

Sales Activity Efficiency Ratios

If you take the example we used above – Joseph Teegardin falling behind on scheduling meetings – it is easy to see why granular data is essential for correctly pinpointing the right skill to improve through coaching. Simply knowing that Teegardin needs to improve his meeting scheduling is not enough. You must ask questions to **dig deeper and identify the root cause of this problem**.

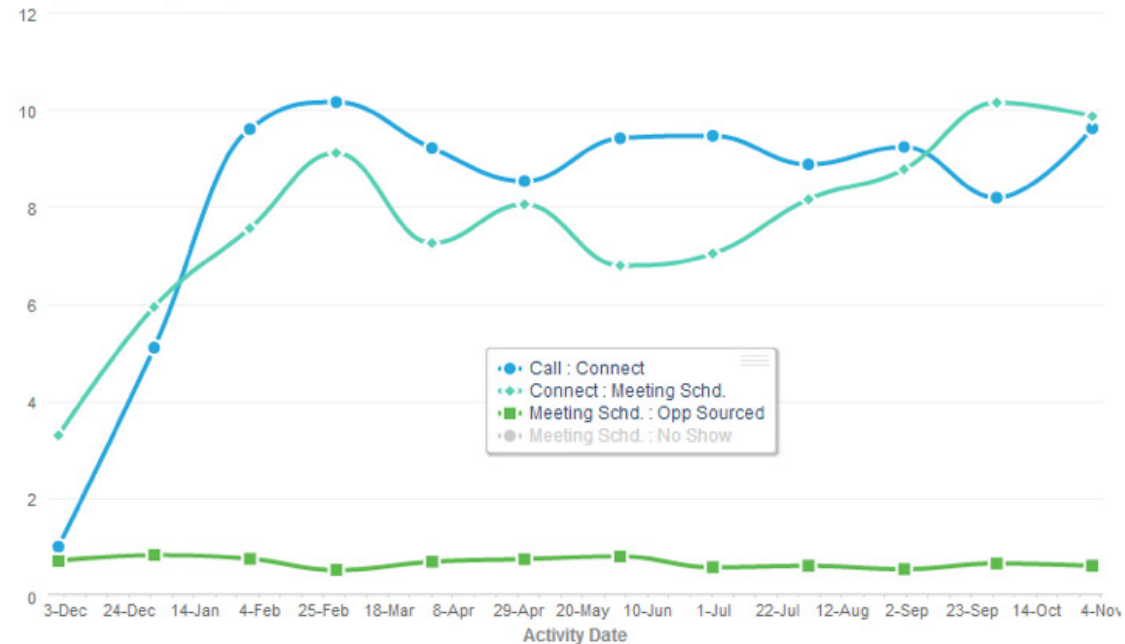
What is accounting for Teegardin's less-than-stellar meetings scheduled performance? Is he simply not making enough calls? Or is it something more complicated? Perhaps he's making a high number of calls but not reaching many prospects because he is calling at the wrong time of day or leaving ineffective voicemails. Or maybe he is connecting with enough prospects but failing to tease out their main pain points, and therefore not instilling a sense of urgency in them to schedule a meeting.

The way you should answer these questions is by using data to explore *the efficiency of the activities your reps are performing.*

Below is a chart that maps individual activities in terms of their conversion rates to related KPIs, such as “Calls : Connect” and “Connects : Meeting Scheduled.”

What is the efficiency of our recent activity?

Activity ratios using activity date

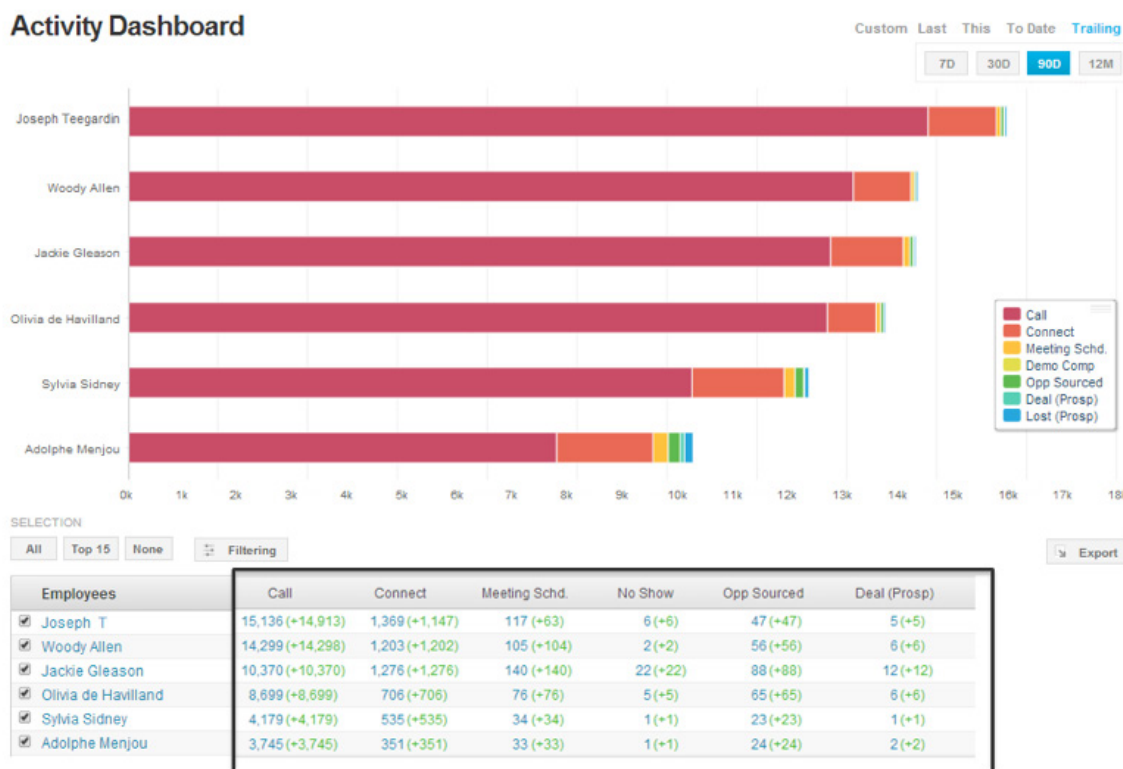


What does this tell you? First and foremost, it helps you instantly identify where a given rep is inefficient and how his efficiency has changed over time. For example, you can see that Teegardin’s “Connects : Meeting Scheduled” ratio hovered around 8 for several months before surging to over 10 recently (meaning it now takes him 10 connects to schedule a single meaning). What accounts for this rise? How does his “Connects : Meetings” ratio compare to other reps on your team as well as to industry benchmarks? Answering these questions will help you provide more tailored coaching to Teegardin and ultimately allow you to help him make his activities more efficient so he can book more meetings.

Coaching Reps on Time Management

Time is the most important asset your reps have, so you must coach them to optimize it. If your reps are spending too much time on calls (especially with unqualified prospects), it will reduce the amount of time they have to hold particularly productive conversations or do research on strong prospects.

Below is a chart that shows how much time a team of reps is spending on the phone.



As you can see, Teegardin has spent more time on the phone than any of the other reps, yet he has failed to book nearly as many meetings. Combined with the data from the other charts, an analytical Sales Manager can begin to pinpoint the causes of Teegardin's poor performance in terms of booking meetings. He's making a lot of calls – and spending a lot of time on the phone – but those calls aren't efficiently leading to meetings.

The data shown in the three reports above helps Sales Managers dig down to the real root cause of why BDRs are struggling where they are. With this knowledge, they can then use targeted coaching to improve execution and achieve results.

But what about closers? In the next section we look at the metrics you should track to coach your Inside Sales Reps to improved performance.

Diagnosing the Right Skill for Inside Sales Reps

Your Inside Sales Reps (ISRs) perform different activities than your BDRs, so naturally you will need to look in different places to identify the areas in which they must improve. For example, while BDRs are primarily responsible for creating opportunities, ISRs are accountable for converting them into deals. Therefore, if you want to know how effective their activities are, a good place to start is by looking at their Win Rate.

Win Rate

Win Rate relates closely to common Business Results – such as revenue \$ amount and bookings # total – so Sales Managers often keep close tabs on their ISRs' respective Win Rates. Below is a chart comparing Win Rates of 7 ISRs.

How many of our opportunities do our employees win?

31% closed in the previous 12 months



This chart shows, for example, that Nancy Olson's Win Rate is a little over 30% while another ISR, Andrea Martin, has a Win Rate of more than 70%. This lower Win Rate has a direct impact on revenue (a Business Result), so it is something that a Sales Manager would certainly want to improve through coaching.

But there's one problem: Win Rate isn't a Sales Activity, and therefore can't be directly managed. You can't simply pull Nancy Olson aside and tell her to raise her Win Rate. However, you can use more granular data to dig deeper and find the root of the problem that can be managed.

And the first place to start digging is in Nancy Olson's sales funnel.

The Sales Funnel

Although it can be boiled down to a single number, Nancy Olson's Win Rate (or any ISR's Win Rate, for that matter) is actually a much more complicated, multi-faceted metric that is influenced by her performance at every stage of the sales process. So if you want a more granular understanding of Nancy Olson's Win Rate, you must look at not only the overall number, but also at how it breaks down at each stage within the sales process.

This is where the sales funnel comes in. The main job of a quota-carrying ISR is to move opportunities from one stage of the sales process to the next and ultimately into Closed-Won. Each stage (from qualifying all the way down to closing) has its own set of challenges, so Sales Managers must look at a rep's stage-specific conversion rates if they really want the full picture of where a rep is struggling.



"Sales Managers must analyze where in the sales funnel there is the most significant drop off from one stage to the next and use that insight to inform you which skill you need to provide coaching on for a specific rep. Any improvements made at the top of the funnel will have a huge effect on the bottom."

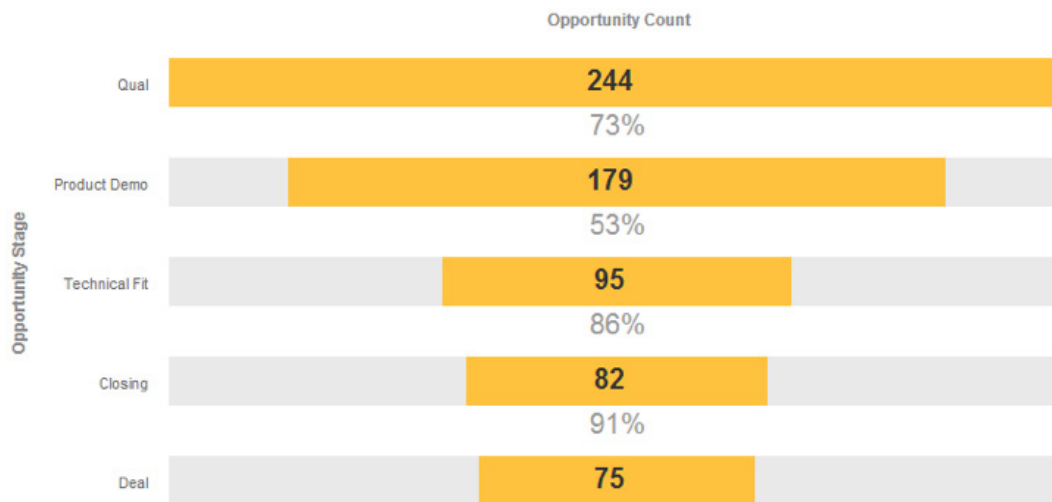
Zorian Rotenberg, VP of Sales and Marketing at InsightSquared

What are Nancy Olson's conversion rates for closed opportunities?

Custom Last This To Date Trailing

7D 30D 90D 12M

31% win rate for opportunities with close dates in the previous 12 months.



For example, the sales funnel above shows that Nancy Olson has conversion rates of at least 70% for every stage except one: demoing the product. Her significantly lower conversion rate for this stage could explain why her overall Win Rate (of 31%) is lower than that of some other ISRs. You should compare her conversion rate for this stage (53%) to other reps on the team as well as the company's as a whole to determine whether there is a significant discrepancy. If there is, this is a good place to start in your mission of identifying the single most important skill for her to improve.

But where do you go from here?

Open Opportunities

Why is Nancy Olson struggling to convert opportunities from the demo stage to the technical fit stage? This is where the real work of metrics-backed coaching comes in, and Sales Managers must keep digging to identify the root cause of Nancy Olson's demo problems. One potential reason could be that she is not picking the right prospects to demo. Is she focusing on opportunities that are too large or small and therefore aren't as likely to buy? Is she demoing the product too early and skipping the step of uncovering BANT (Budget, Authority, Need, and Timing) and correctly qualifying opportunities?

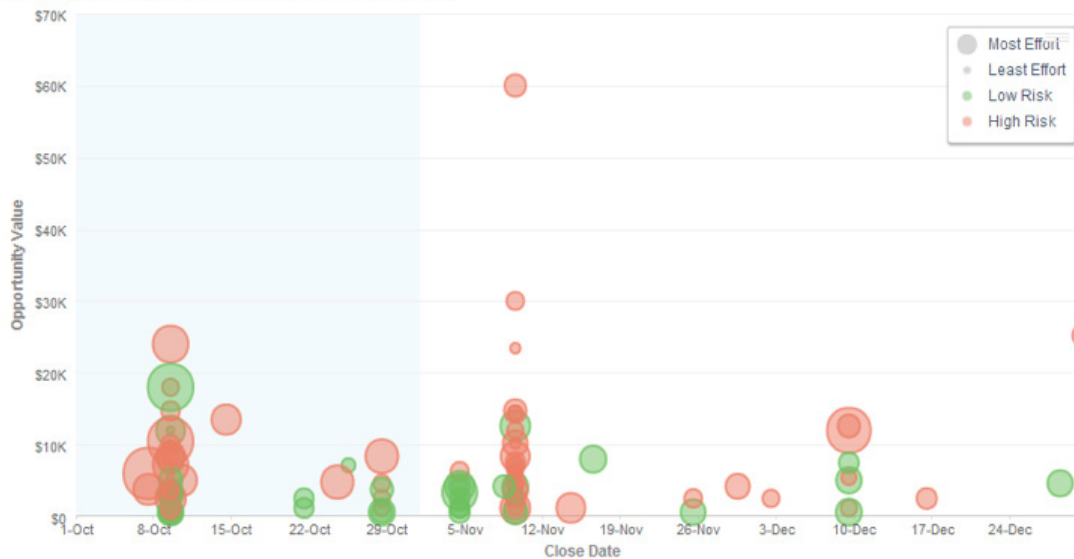
You can find the answer to these questions by closely inspecting the open opportunities in her pipeline, which is shown below.

What is the current state of our pipeline?

\$679,368 of value with close dates in the next 90 days

Custom Last This To Date Trailing Forward

7D 30D 90D 12M



In the chart above, Nancy's open opportunities are plotted by expected close date and expected value. A circle in the lower left corner represents a small opportunity expected to close very soon. Conversely, a circle in the upper right corner signifies a large opportunity with a distant close date.

The circles are also different sizes depending on how much work Nancy has expended on them. Larger circles indicate that she has performed many activities against that particular opportunity. Finally, the opportunities are also shaded either red or green depending on whether they are at-risk (red) because they have stalled in the funnel or are not in line with historical closed-won characteristics of size and age.

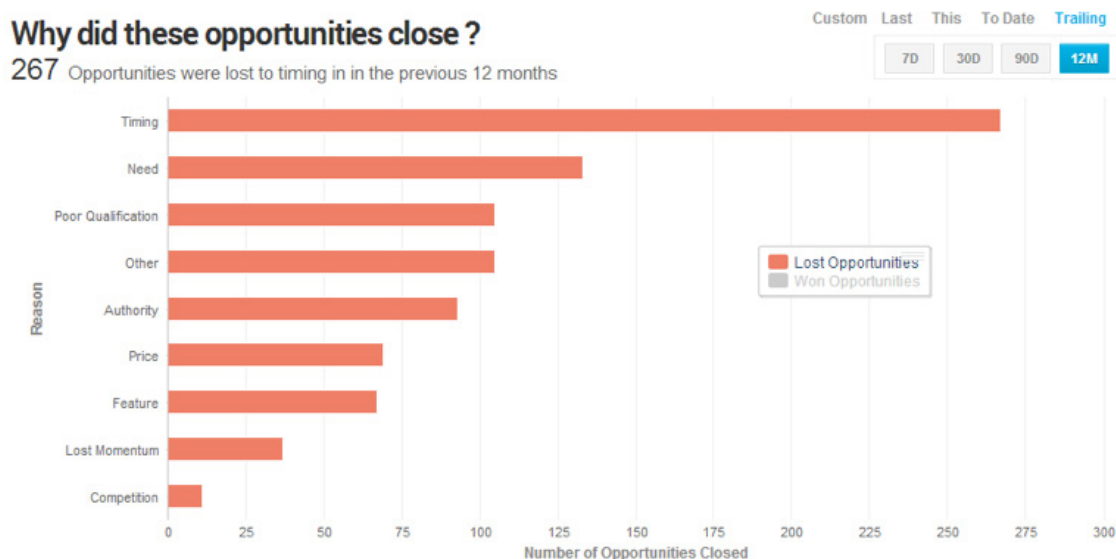
Closely analyzing Nancy's open opportunities can help you determine whether she is investing her time in the right places. The fact that she is having difficulty moving opportunities past the demo stage might indicate that she needs to improve either the way she selects which opportunities to demo or her demo presentation skills themselves. (Or both.)

For example, it looks like most of the red circles are larger than their green counterparts, suggesting that Nancy is devoting a lot of her attention to at-risk opportunities. This could suggest that her demo-stage conversion rates are suffering because she is spending too much time demoing the product to opportunities that are unlikely to convert.

Win/Loss by Reason

Another way to determine why a rep like Nancy is struggling at the demo stage is by analyzing her Closed-Lost opportunities. Is she repeatedly losing opportunities for the same reason or is each loss ascribed to a unique cause?

The chart below shows all of Nancy's lost opportunities arranged by reason.



The top 3 reasons – Timing, Need, and Poor Qualification – might indicate to a Sales Manager that Nancy is in fact wasting time demoing the product to under-qualified opportunities. If other data suggest that this is the case, Nancy's Sales Manager has successfully targeted a Business Result (revenue from new bookings), worked backwards to find the Sales Objective that is influencing it (low Win Rate) and then identified the manageable Sales Activity that is causing the shortfall (opportunity prioritization and time management).

These are just examples of potential targets for sales coaching. To truly identify the right skills to focus on, you must look at the data from your own reps and use it to identify the one skill that each rep is struggling with the most.

Your work isn't done when you diagnose the right skill, though. To truly be in line with an execution coaching model, you must then come up with the right coaching rhythm so you can make sure your reps actually change and improve their execution in the field. In the next chapter, we outline the best way to incorporate coaching so you can improve your reps' performance and achieve Business Results.

Chapter // 4

Implementing an Execution Coaching Model

Summary

In the previous chapters you learned about the fundamental advantages of an execution coaching model and how to use data to structure it. In this chapter, you will learn the rest of the puzzle: How to implement the targeted conversation-based coaching model so that you can quickly improve your reps' activities and start achieving your desired Business Results. This chapter presents a simple 7-step process for execution-based coaching, including:

- Designing coaching sessions
- Picking the Right KPIs
- Tracking Progress over Time

You now know what sales coaching is, why it's important and how it differs from traditional coaching models. You've read about some of the common challenges to sales coaching and resolved not to adopt any of these bad characteristics. You've familiarized yourself with some of the key sales performance metrics that should be used in sales coaching. Now, all you're left with is one big question:

"How should I run my next analytical sales coaching session?"

Follow these step-by-step tips to ensure that your next analytical sales coaching session is productive and well-received.

#1: Schedule your coaching sessions, starting at the beginning of each month

You want to schedule your targeted coaching meetings on the first business day of the month, or as close to it as possible. This ensures that you kick off the new month on the right foot, instead of letting the previous month's errors and weaknesses carry over and linger longer than they should.

#2: Discuss key areas to coach or listen to. Observe sales calls or recordings to determine what to coach.

Spend some time either shadowing reps and observing them on their sales calls, or watching recordings of their sales calls to track their progress in the activity you're hoping to improve. From there, communicate with the rep what you are expecting them to bring to the session and what area you will be focusing on.

#3: Plan the coaching session. What personal and professional goals is the rep setting? Which skills are they focusing on?

Goal setting is a key part of sales coaching for every rep. Help them work through their own goals. Do they want to make more dials this month? Should they improve the efficiency of their dials in getting a prospect to the demo stage? Help your reps figure out what goals they should set for themselves, and how their goals tie in to larger company goals.

#4: Choose the baseline KPI.

For metrics-backed coaching in an execution coaching model, it's all about the numbers. For the skill that you are working on, look at what the rep's relevant metrics were for that skill in the past. For instance, if you're working on improving the rep's activity efficiency rate for "Connects : Meeting," make sure to check it for the previous month ? What is the metrics-based goal for where that efficiency rate should be after this sales coaching month?

#5: Conduct the coaching session, uniquely crafted to each individual rep.

After you've identified the skill to work on, it's time to delve into the tactics of how the rep will improve that skill. Put your heads together to come up with a plan that is customized to how this rep learns – after all, everybody learns differently, so there should never be a one-size-fits-all approach to sales coaching. Identify the metrics that a) will help the rep improve on the skill and b) the rep will be measured against on this goal.

#6: Continue with a follow-up.

When will you meet next to discuss the progress on this skill? If it is a small thing to work on, maybe the next meeting could take place next month. However, if the skill in need of improvement is a major problem that requires lots of attention, it would be best to schedule more regular intervals between sales coaching sessions.

#7: Measure improvement in the baseline KPI and coach until that one skill is complete. Move on to the next skill.

Once the rep has made enough improvements on this one skill – as demonstrated by measuring against the baseline KPI – it's time to move on. Identify the next area of weakness that this rep should work on for the next month, set the baseline metrics again, and repeat the entire process. Remember to always focus on one skill at a time, so as to not overwhelm the rep.

Additionally, here are some great questions to ask at every coaching session:

- What are you trying to achieve?
- What would it mean to you personally if you were to achieve this?
- What are your short-term and daily activity goals?
- What exactly is going on in this specific situation? Why do you think this is happening?
- What could you change about yourself that would bring out the best in you?
- What stands in the way of achieving your goals?
- What do you think is the best option for solving this?
- When should we meet to look at your progress?

These type of probing questions are designed to lead the rep down a path of self-discovery. Remember, coaching works best when there is full buy-in on the part of the sales rep. When you frame the session in a way that shows you care about the rep personally and helping them achieve what they themselves want to achieve, it will end up being a much more productive session.

Conclusion

If hitting your bookings number was as easy as telling your reps to win more deals, every sales team in the country would hit their number every quarter. Unfortunately, it's not so simple. Your top-line results are the product of much smaller-scale, nuts-and-bolts activities. If you want to move the needle, you need to start by picking the right activities to manage and implementing a regular, structured coaching plan to improve them.

In this eBook, we laid out a framework for accomplishing this:

1. Identifying the sales metrics you can actually manage
2. Analyzing the one activity each rep needs to improve
3. Implementing a coaching cadence to improve the targeted activity

With this straightforward plan, you have a much better shot at achieving the Business Results you're accountable for. What's more, this plan also adapts to changing goals and scaling businesses, because it is not based on specific objectives, but rather on constantly re-aligning activities to goals as they change and using data to establish the right coaching plan.

Although most Sales Managers say they value coaching, few of them put their money (or time) where their mouth is and work regular coaching into their schedules. Put an end to that foolish approach by incorporating the lessons of this eBook into your day-to-day sales process.

#1 for Salesforce Analytics

About InsightSquared

InsightSquared is the #1 Salesforce Analytics product for small and midsize businesses (SMB). Unlike legacy business intelligence platforms, InsightSquared can be deployed affordably in less than a day without any integration costs and comes preloaded with reports that real business people can use. Hundreds of companies and thousands of users around the world use InsightSquared's award-winning analytics to maximize sales performance, increase team productivity and close more deals. Based in Cambridge, Mass., InsightSquared was recently named one of the "Best Places to Work in Massachusetts" by the Boston Business Journal.

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