

# Sales Coaching & Development System



## Create the ultimate sales development tool for your sales team

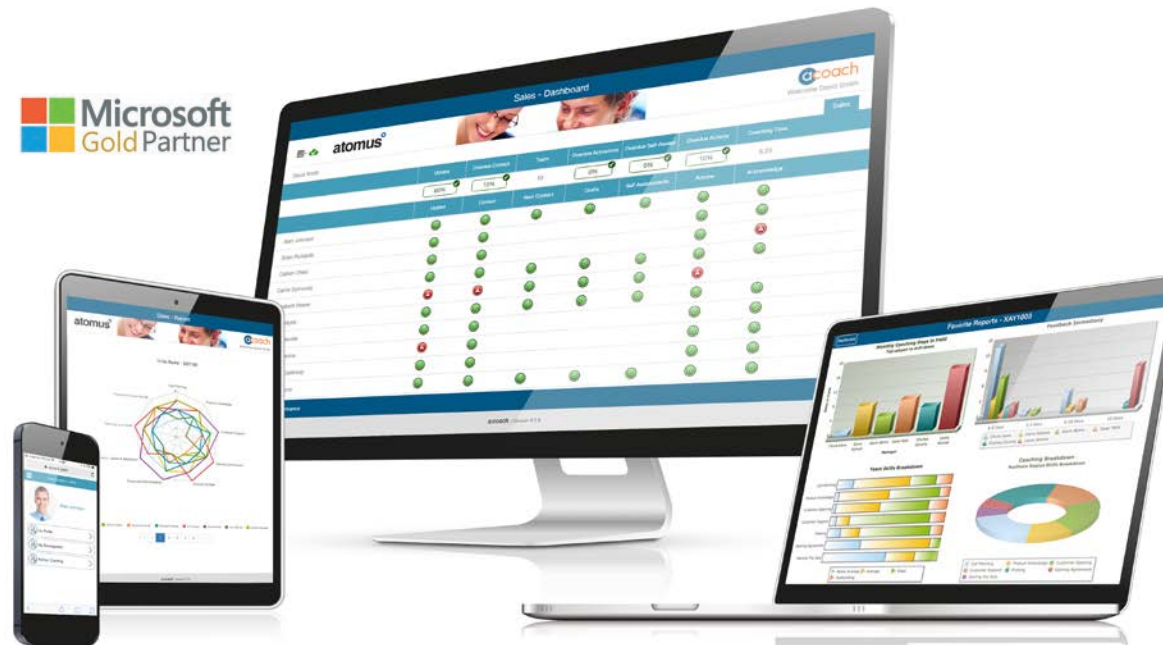
**Improving the Effectiveness of Your Largest Investment** – Achieving more from your existing sales resource is paramount to sales performance improvement and success in the current climate.

The overarching goal of acoach is to ensure that organizations are able to track and improve coaching interactions between Sales Managers and their teams. These interactions are frequently not documented, or at best hidden from view; sometimes even from the person they are targeted to help.

Many organizations now stipulate that managers spend 60% of their time on face to face coaching of their teams in order to increase performance. Yet critical feedback from those meetings often remains hidden within Excel spreadsheets or Word documents leading to a very poor return on a significant investment.

**Unlock Your Sales Teams Potential** – improve the effectiveness of every coaching session. Turn B Players in to A Players with frequent on-the-job training reinforcement. Bring new hires up to speed faster. Better motivate key sales and management personnel to increase retention. Provide your sales leaders with the tools to create and consistently develop replicable, measurable progression with each customer interaction.

**Software as a Service** – acoach is a multi-module, laptop and mobile device enabled SaaS application hosted on the Microsoft Azure cloud platform. acoach is fully customizable to ensure seamless integration with your organization's own sales structure and culture. The acoach application, training, technical support, business support and hosting is supplied at one, all-inclusive monthly price per user. This means you only pay for what you need now whilst having the ability to activate additional features over time as the developmental needs of your sales force grow.



### Maximize Training & Coaching ROI

- ✓ Increase pull-through on existing training
- ✓ Identify where to target training spend
- ✓ Identify and rectify the causes of weak performance
- ✓ Streamline and enhance existing coaching programs
- ✓ Ensure each team member has a valid and current coaching plan
- ✓ Give your managers back some time
- ✓ Enhance customer interactions
- ✓ Track adherence to your coaching methodology
- ✓ View critical KPI's at the touch of a button
- ✓ Raise morale and motivate sales teams
- ✓ Create consistency on and between coaching sessions
- ✓ Turn B players into A players

## Transforming Sales Performance in over 40 countries



## Getting Started

**Meeting Your Needs** – Regardless of the status or maturity of your current coaching methodology, the Atomus Business Team will help you overcome your challenges and deliver the solution you need. Atomus partners with some of the most demanding global organizations and are expertly qualified to answer any challenging questions you might have. We will help you create the process, content and tools to shape highly successful sales force development initiatives.

**Give your Managers the Tools they Need to Perform** – One of the greatest challenges for organizations looking to improve both the development and performance of their sales team is when managers say they simply do not have sufficient time for coaching. acoach speeds up the process for coaching related tasks which help your managers become more effective and efficient, faster.

acoach enables organizations to support their manager's efforts by ensuring the coaching process is clearly defined and that all the necessary tools for team development are both centralized and easily accessible. Many clients report that acoach has become one of the most utilized tools on their sales manager's iPad / laptop.

**Four Packages, buy what you need when you need it** – acoach is now available in four entry level packages, designed in a way that makes it simple for you to select the most appropriate entry point for your organization. The Atomus Business Team will explain the purpose, features and benefits of each acoach edition, working closely with you to identify the right package for your organization. All editions can be further configured to embrace existing, or desired, coaching and training reinforcement approaches. Additional functionality can be added over time, module by module, to address your mid and longer term needs.

**Business Case** – Since the benefits of an acoach deployment can be seen within a short time frame, it is relatively simple to justify and demonstrate your return on investment. The Atomus team will help you develop a clear road map which turns a potentially daunting task into an achievable reality with a compelling business case. This will include both short and long term financial and performance predictions for you to share within your organization.

## Skills & Competencies

**Defining Standards** – Leading organizations often provide their sales force with some form of skills definition matrix, or competency model, as a behavioral baseline. Depending on the culture and focus within the organization, these may range from simple business and selling skill definitions to complex customized competency models. Many organizations require sales managers to observe, assess and document their representatives skills and behaviors whilst 'on-the-job'. This helps to pinpoint the source of any recurring issues by understanding the underlying reasons why the manager chose to coach a specific skill.

To excel in any skill, the representative must be absolutely clear about specific behavioral expectations the organization has for that skill. One of the most popular and helpful features in acoach is the pop-up skills descriptor which lays out a clear definition of what success looks like for each of the skills listed. This can be taken one step further by defining the exact behaviors expected at each level of performance for all the skills. This provides the clarity and consistency a manager needs to rate, identify, develop and coach the skills needed to improve the overall performance of their team.

“ 85% of sales training is forgotten after 4 months without on-the-job reinforcement. ”

ES RESEARCH



**Introduce, Reinforce and Develop** – Organizations normally fall into one of two 'camps'; those that are about to launch a new sales or coaching model or that are redefining their current competency model and those that have already invested heavily in their coaching or sales model, yet still need to raise the bar.

acoach is the ideal platform for either of these scenarios. By working with your own pre-existing content to lay down clear processes that ensure ambiguity is kept to a minimum, your coaching KPI's can be clearly and transparently measured to promote rapid adoption and usage leading to eventual success.

**Multiple Skills Sets across Multiple Teams** – acoach's template driven content delivery approach provides organizations with the ability to create different sets of skills and competencies for each country, division, sales team, job function or seniority level. Skills and competencies can be added or updated to reflect market needs, economic conditions, new product arrivals or unique selling points. acoach ensures your frontline sales personnel are being coached on the specific skills they need to overcome competitors and successfully sell your products and services.

## KPI Management

**Set Metrics & KPI's** – At the outset of implementing acoach, KPI's and tolerance thresholds can be configured for dashboards, automated reminders and reports. Both qualitative and quantitative metrics can be established, benchmarked and tracked. The Atomus team will ensure you have the correct KPI's to monitor coaching outcomes and progress towards your goals. In addition senior leadership, legal, compliance, training and HR teams will also be able to access the detailed management information they need.

**Reminders & Indicators for Managers** – The acoach activity dashboard delivers instant visibility of your coaching 'pulse' at all levels. Dashboard alerts can be combined with automated e-mail reminders to direct the user instantly to any coaching related event that needs addressing.

**Beyond the Software** – The Atomus Business Support Team can go one step further by offering a 3rd party objective view and qualitative analysis of your coaching reports. Atomus in-house Sales Trainers can analyze and report back on the performance of your coaches against an agreed set of criteria e.g. achievable goal setting, assigning of SMART actions and concise and constructive feedback.

Territory	Days	Job Title	SS	BS	CP	PK	CR
XAY1013	7.00	Rep	3.00	3.00	3.00	3.00	3.00
XAY1073	8.00	Rep	2.00	2.00	2.00	2.00	2.00
XAY1053	7.00	Rep	4.00	4.00	4.00	4.00	4.00
XAY1103	3.50	Rep	1.60	2.00	2.00	3.00	1.00
XAY1093	1.00	Rep	2.60	2.50	3.00	3.00	3.00
XAY1023	1.00	Rep	3.00	3.00	3.00	3.00	3.00
XAY1043	3.50	Rep	3.00	3.00	3.00	3.00	3.00
XAY1033	11.50	Rep	4.60	4.50	5.00	4.00	5.00
XAY1083	10.75	Rep					

“ 46% of respondents rated “coaching by the sales manager” as one of the most effective ways for reinforcing new sales skills. ”

SALES PERFORMANCE INTERNATIONAL

## Training Reinforcement

**Improve New Skill Retention & Training ROI** – Nationally, sales training budgets are once again on the increase. Sales training is truly a major investment and one that needs to be constantly leveraged, managed and improved. The duration of a training course does not provide sufficient time for behavioral changes to become embedded. For sales training to be really effective, the employee has to fluently and continuously apply what they have previously learnt during those all important customer interactions, otherwise the money and effort spent on training is diluted or worse still – wasted.

**Make Training Stick Through On-The-Job Reinforcement** – The key is to understand what the training was designed to achieve and for the manager to then observe the application of newly forged skills during live customer interactions.

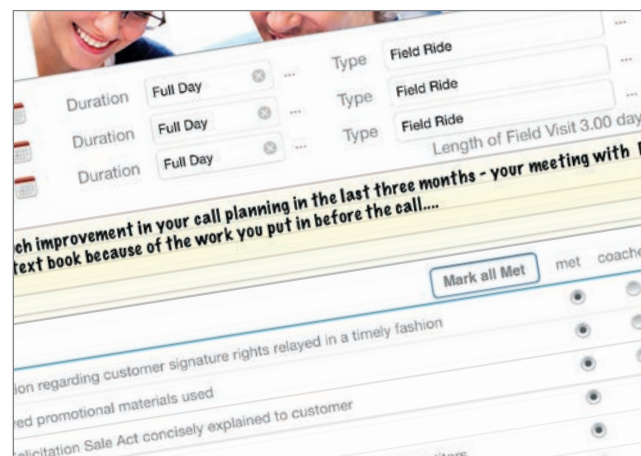
acoach places on-the-job training reinforcement tools at the manager's fingertips. Sales Representatives who have recently received training can be flagged for on-the-job follow up. In addition, post-training related goals and actions can be assigned by the training team. Significantly improve your training ROI with acoach and get the behavioral changes and increased performance results you deserve.

## Reporting

**Gain Insight & Drive Improvement** – acoach lifts the veil on sales force development, providing visibility of information that has historically not been captured nor made easily accessible. It also removes the challenges of extracting feedback hidden in Word or Excel documents on laptops or in hand written Coaching reports. Gain the insight you need to make informed decisions on how best to get more from your most valuable asset – your sales force.

**Intelligence for All Levels of the Organization** – acoach delivers meaningful and often eye opening reports. There are over 60 standard reports as well as the capacity to design your own customized reports to ensure the resulting KPI data can be easily understood and circulated.

Dynamic reports on current status and progress over time are available to all users. Heads of sales, training, sales force effectiveness, HR, legal and regulatory departments can instantly access information to raise the bar and improve effectiveness. Second Line Managers and Regional Directors can view rolled up reports, allowing them to focus on specific activities for development or mentoring. First Line Managers are able to generate reports showing all aspects of both team and individual sales representative's performance. Open up a new world of sales force visibility, understanding and improvement with acoach.



## Compliance

**Track & Manage Regulatory Compliance** – Keeping track of regulatory compliance across a sales force is inherently difficult, especially as sales teams are highly mobile and verbal. In addition, compliance and regulatory departments are experiencing increased pressure from government bodies to ensure that each customer interaction adheres to strict mandated ethical guidelines.

**Best Practice Checks** – Managers are able to assess and record each representative's adherence to your organization's compliance criteria at the end of every customer interaction. In this way acoach ensures that mandatory compliance requirements are tracked. When requirements are not met, the relevant personnel or departments are automatically notified of the breach via email enabling remedial action to be instigated.

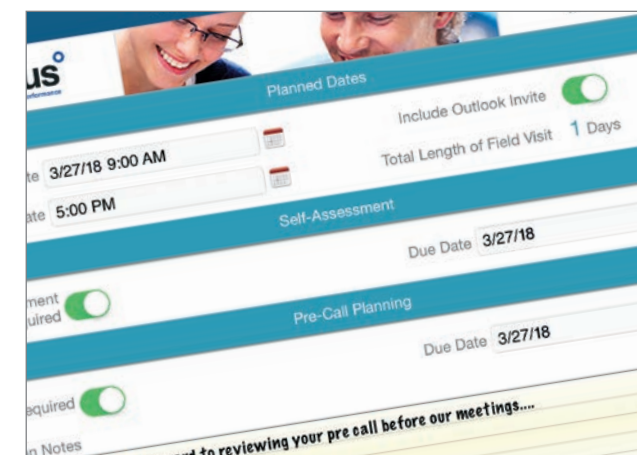
**Reduce Management, Administration & Auditing Costs** – acoach helps you reduce the cost of sales compliance monitoring, identifies compliance breaches and provides evidence of on-the-job compliance checks and rectification procedures. The highly effective acoach compliance feature can be seamlessly integrated into Coaching Plans. Dynamically generated reports and alerts provide a valuable insight into what really happens when your sales personnel interact with your customers.

## Advanced Features

**acoach 360 Module for Developing Sales Managers** – More and more organizations are realizing that for a true coaching culture to exist it must permeate throughout the entire organization. The acoach 360 module allows Second Line Managers to carry out a parallel coaching and development needs exercise with their management team. The process combines self-assessments, upward anonymous assessments from the team, assessments from the Second Line Manager and a comprehensive development plan, all within one tool.

**Co-Coach Module for Sales Trainers & Managers** – Sales Trainers' efforts are too often isolated, and remain out of sync with team managers, due to lack of visibility and communication on both historic coaching and current goals. This can lead to confusion and lack of positive improvement from the representative's viewpoint, as coaching continuity falls by the wayside. acoach ensures that all parties involved in coaching can access, amend and build on a SINGLE Coaching Plan until the desired skill level is reached.

**Customizing acoach** – Coaching needs evolve continuously in the fast paced world of sales. You have control over which features to switch on or off so that your acoach configuration meets your specific requirements at any time. As business demands change, the Atomus Business Support Team will ensure you are always aware of the latest functionality and available features so you can stay aligned with the developmental objectives of your sales force.



## Integration

**Leverage Existing Investments** – acoach is a fully self-contained sales performance development application and is often integrated with existing sales force automation tools by importing or exporting relevant data from CRM, LMS, and HR systems.

Integrating acoach helps organizations to achieve optimal efficiency and results. This unification of systems enhances user friendliness and eases adoption of use. Integration with acoach and the Microsoft Azure Cloud platform prevents data duplication and can be implemented with minimal internal IT resource assistance.

**Easy Access to Additional Resources & Information** – Atomus recognizes that it is imperative for managers to seamlessly access contacts, customer information, training courses and related learning materials. Empower your managers with one simple tool where they can find all the information and resources they need to analyze, refine and develop their sales personnel between and during coaching sessions.



“The return on investment for training quadruples from 22% to 88% when reinforced by on-the-job coaching and reinforcement.”

SALES EXECUTIVE COUNCIL

## Service & Support

**Deployment & Training Assistance** – Atomus understands that one of the major factors of a successful sales force automation implementation is the ‘behind the scenes’ effort that ensures the training, launch and ongoing support of the tool is optimized. Atomus has unprecedented experience in launching acoach with numerous organizations in over 40 countries. The team will provide detailed pilot and go-live scenario options based on your timeline, with provision for live, web based and video training sessions to ensure that acoach is embedded and optimized from the outset.

**Help Desk** – An individual help desk portal is created for each client where all users are able to see the answers to Frequently Asked Questions or the status of their support call. The acoach Help Desk relieves the pressure from your own IT help desk, even providing First Line support of acoach if required. This minimizes the need for extensive help desk training and alleviates additional calls to your own help desk.

**Monthly SLA Reports** – Technical system performance data will be provided on either a monthly or quarterly basis. Clients receive charts and data on uptime, bandwidth utilization, processor utilization and database size, as well as in-depth reports on user support calls, issue resolution time and incident management.

**Business Reviews & Account Management** – Unlike most SaaS providers, the Atomus Business Team works alongside you and your stakeholders to continuously drive overall success. This level of ongoing support and account management forges a working partnership and helps clients review their sales force development objectively. These reviews also provide the mechanism for clients to preview new functionality as it is being developed and to also discuss future challenges and request new features. This support service has proven invaluable to system sponsors helping them to plan ahead, identify areas for improvement and to meet the organization’s objectives.

## Version 5.5

acoach ensures you have the ability to create the ultimate tool for developing your sales force by matching your current needs with the appropriate entry level edition selected from one of four options below. Each edition has a set of features designed to solve common issues and challenges at different levels.

To help you pinpoint the edition that best suits your needs today, an example scenario is included under each description. Your final selection will be configured with your own branding and content. You can also select additional compatible features to further hone the tool to match your exact requirements.

### 1 LITE EDITION

**Features:** Sales Coaching Report, Visit Duration, Rating Descriptors, Time Stamped Free Text Observation Entry, Goals & Actions Free Text Fields. Lite Edition Reporting Module.

**Example Scenario:** Our sales coaching process is still in its infancy and is captured in a variety of disparate ways. Our first step would be to standardize our approach and introduce a simple electronic sales force development tool.

### 3 BUSINESS EDITION

**Features:** Manager Assessment, Rating Descriptors, Time Stamped Free Text Observation Entry, Coached Skill Selector, Sales Coaching Report, Visit Duration, Goals & Actions Free Text Fields, Actions Comments & Due Date Picker, Coaching Feedback & Duration Log, Dashboard and Business Edition Reporting Module.

**Example Scenario:** We already have a method for encouraging and tracking coaching sessions, but it’s due for an overhaul. Senior Leadership are looking for a simple, business aligned tool that will allow us to ascertain basic quality and quantity metrics.

### 2 ENTERPRISE EDITION

**Features:** Manager Assessment, Representative Self-Assessment, Rating Descriptors, Time Stamped Free Text Observation Entry, Coached Skill Selector, Sales Coaching Report, Coaching Model Process Guide, Optional Pre-Populated Goals & Actions, Goals & Actions Free Text Fields, Goal Comments & Due Date Picker, Actions Comments & Due Date Picker, Rep Acknowledgement, Dashboard And Enterprise Edition Reporting Module.

**Example Scenario:** We have worked hard to introduce a coaching and/or sales model for our sales teams and also have useful developmental resources. We now need a tool to centralize all our coaching components and to measure our progress.

### 4 ENTERPRISE+ EDITION

**Features:** Manager Assessment, Pre-Call Planner, Representative Self-Assessment, Rating Descriptors, Time Stamped Free Text Observation Entry, Coached Skill Selector, Sales Coaching Report, Coaching Model Process Guide, Optional Pre-Populated Goals & Actions, Goals & Actions Free Text Fields, Goal Comments & Due Date Picker, Actions Comments & Due Date Picker, Training Resource Selector/Rater, Rep Acknowledgement, Selling Aid Requestor, Co-Coach, 360 Manager Coaching Process, Dashboard & Enterprise Plus Edition Reporting Module.

**Example Scenario:** Sales Coaching and the associated metrics have already been identified and form a major part of our sales force culture. Both senior leadership and sales management are keen to understand industry best practice and to adopt a roadmap to guide us to the next level.

## Prioritize Your Quick Wins & Long Term Gains

Atomus understands that increasing bottom line profitability through enhancing sales force performance is every organization's ultimate goal; but that they are also likely to have a number of individual differentiators that will dictate the route they take to arrive at that final destination.

acoach can be deployed to assist in achieving a multitude of sales force performance goals. However, these goals often have differing priority levels at the start of the initiative. You will find some of the most frequently heard objectives listed by category below. This should make it easier for you to make the first attempt at identifying the correct entry point edition of acoach for your organization.

You will see four headings in the following tables, under each one is a list of 10 possible objectives that may mirror or be very similar to your own objectives. Simply choose a category (or all four if you wish) and rate each of the objectives in the category with a score from 1-10, based on how important it is for you and your organization to achieve that objective in the next 12-18 months.

Once you're finished, simply total the scores in each completed section to obtain a clear picture of your prioritized needs. This forms the starting point to engage with an Atomus acoach specialist. They will explain the different editions in more detail in order to guide you to the optimum package for your organization.

On-The-Job Coaching Effectiveness	Importance Score 1-10
1. Move from our current paper, Excel or Word based coaching process to an electronic coaching system	
2. Implement and measure ongoing improvement of coaching KPI's	
3. After investing heavily and introducing a new Coaching / Sales Model we now need to monitor its adoption and progress	
4. Create and implement an organization wide consistent coaching and development process	
5. Ensure managers add coaching feedback to their Coaching Reports in a timely manner following coaching sessions	
6. Improve on-the-job coaching frequency, quality and effectiveness	
7. Ensure completion and documentation of Coaching Reports are relevant to today's needs and simple to achieve	
8. Gain a clear picture of coaching activity and progress over time	
9. Minimize representative overload and ensure post coaching goals and actions are clear and achievable	
10. Gain regular feedback on the validity of marketing and training materials direct from the sales team	
<b>SECTION TOTAL</b>	

Training & Coaching Development	Importance Score 1-10
1. Strengthen on-the-job training reinforcement	
2. Inform our managers of new and existing skill related training resources at the point of coaching	
3. Gain clarity on where to target our training budgets across teams, divisions and regions	
4. Create continuity across representative coaching from Sales Trainers / Coaches and Team Managers	
5. Significantly increase continuity across coaching sessions	
6. View a coaching performance dashboard that highlights and reports on coaching activity and anomalies across teams with the ability to drill down to ascertain the root cause	
7. Fulfill requests from Senior Leadership to implement a more advanced, effective coaching process / measurement tool	
8. Introduce a skills assessment process into our coaching so we can understand manager observations and the reasoning behind WHY a skill should be coached	
9. Align our coaching process with our Coaching / Sales Model	
10. Implement a coaching and development process for the managers, in addition to one for the representatives	
<b>SECTION TOTAL</b>	

Manager Enablement	Importance Score 1-10
1. Make it simpler and faster for managers to complete coaching reports for their teams	
2. Provide a coaching performance dashboard so managers can ascertain when a coaching activity is due, or needs attention	
3. Align coaching session objectives more closely with recent sales training	
4. Monitor whether representatives read, and act on, coaching reports created for them by their managers	
5. Alleviate the need for managers to send coaching reports manually to their representatives	
6. Deploy a coaching application that runs on both iPad and laptop	
7. Provide managers with the ability to use a tool that is available when on-line connectivity is not possible e.g. on a plane	
8. Deploy a coaching mechanism that allows representatives to feedback their own perception of their developmental needs for more candid coaching conversations with their managers	
9. Provide a clear framework to ensure managers coach using the agreed organizational methodology	
10. Ensure managers have instant access to available skill related resources when a developmental need is identified	
<b>SECTION TOTAL</b>	

Visibility & Reporting	Importance Score 1-10
1. Gain early visibility of key coaching activity 'red flag warning signs' in order to take remedial action	
2. Deliver an effective baseline comparison and remedial mechanism to assist managers in moving their B players to A players	
3. View reports on which training and coaching resources have the most impact	
4. Identify frequently occurring skill gaps/training needs across teams	
5. Better align training and on-the-job coaching to maximize effective use of training budget	
6. Compare individual, team and regional coaching activities, and progress toward goals over time	
7. Automate Legal & Compliance notification of compliance breaches as they occur	
8. An industry or government directive is mandating that we prove how we are tracking and resolving sales compliance issues	
9. Sales Training have a need to easily locate, and send PDF's of relevant coaching reports promptly from a central location in response to requests from Legal & HR	
10. Ensure Second Line Manager and Regional Director accountability for their sales team development by delivering monthly updates and KPI reports for discussion	
<b>SECTION TOTAL</b>	

## Your Perfect Package

The power of acoach stems from its in-built flexibility. The flexibility of configuration, and template driven content, sets it apart from other applications. acoach seamlessly integrates with your culture and the methodology you have decided your sales force will utilize in order to grow and prosper. This means that when you launch acoach, your organization will embrace it as their personal tool.

The four acoach editions make it simple for you to deploy an application that fixes your most pressing current issues, with the reassurance that you will also have access to functionality that will be able to resolve future challenges.

acoach will grow with you and allow you to control the implementation of new features over time. Your acoach specialist will continue to work with you regularly to ensure that, as new challenges to your sales force performance development process arise, you are ready to respond rapidly and can also measure the results of any changes.

## Find Out More

Contact Atomus today to discuss your short and mid-term objectives and the challenges around your sales force performance development initiatives. With the aid of a short on-line demonstration you will quickly see how other organizations have been able to harness the power of acoach to overcome similar challenges to those you are currently facing.

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