



# *10 WAYS*

TECHNOLOGY-ENABLED SALES COACHING  
WILL DRIVE YOUR SALES FORCE PERFORMANCE

# Only

those businesses who had a formal coaching process (20.2%) achieved sales metrics at above average.

Source CSO Insights 2016 Survey

## The understanding

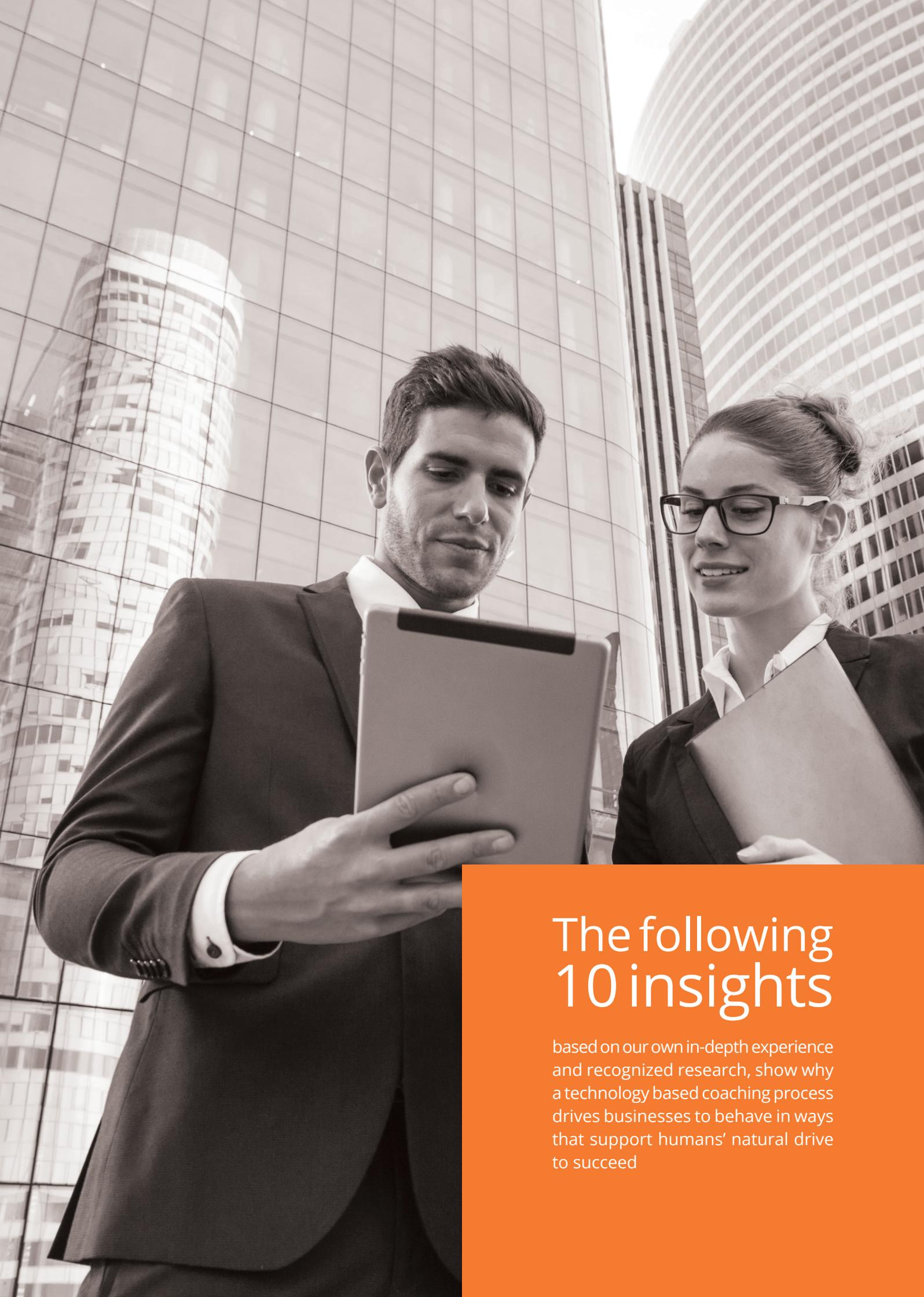
of what drives individual and team behavior within organizations, and the leadership practices required for success, has advanced exponentially over recent years.

The fields of cognitive behavior and neuroscience have offered academics and now leading-edge businesses insights into human behavior, while data-analytics have become more refined and trusted within organizations.

World class businesses have become much better at aligning the behaviors of their people to their business strategy and vision, and getting this right is recognized as a source of distinct competitive advantage in today's fast-paced world

In the sales management arena, ever more complex B2B sales are driving the need for sales reps to effectively partner with customers to deliver solutions that meet their requirements. A skilled, educated, adaptable and aligned salesforce is now a priority. The age of the coaching process model of 'performance development' has arrived!

A true coaching culture supports our basic human motivational needs and provides the means for delivering superior performance.



## The following 10 insights

based on our own in-depth experience and recognized research, show why a technology based coaching process drives businesses to behave in ways that support humans' natural drive to succeed

# We need to feel in control of our own destiny to perform at our best

## The Power of Self-Assessment

***In a study of 2,500 organisations by Deloitte, only 8% believed their performance management process drove high levels of value. A similar study of 1056 organisations by Mercer found only 3% delivered exceptional value.***

*It is a deeply human need to direct our own lives, to learn and create new things and to do better by ourselves and our world.*

**Daniel Pink,  
Author of Drive.**

Traditional performance management systems have too often been demotivating for individuals. Their annualized nature, their focus on assessing the past (over which we no longer have any control), their use of forced ratings to suit company reward systems (where managers have little control or opportunity to differentiate) and their openness to bias and prejudice all put folks in a 'threat-state'. And to add insult to injury there is no empirical evidence that they deliver their intended goal of improving business performance!

The result is that these performance reviews become uncomfortable encounters or worse, that the entire process is simply ignored and regarded as a time-wasting administrative HR and managerial burden. A coach have received great feedback from all sides by introducing the ability for both Representative and Managers to regularly (every 4 – 6 months) engage in a 2-way skills review process. This allows them both to assess the Rep against pre-defined proficiency levels, highlight any skills gaps, and align on the root cause and take remedial action if necessary.

This provides the manager with a stepping stone to the critical coaching conversation; gives the Rep a voice in their own development and also removes the 'threat-state' emotional barriers in a coaching relationship from the off.

# Coaching needs to become just the 'way we do things around here' to be taken seriously

Technology provides Coaching Visibility & Transparency  
- the first step to a positive coaching culture



*Google's Project Oxygen found the key differentiator between a good and a great manager was being a good coach.*

<https://rework.withgoogle.com/subjects/managers/>

For any coaching program to drive sales force performance improvement, performance conversations must become part of business as usual, a natural and regular part of business life. More frequent, better quality conversations must become the norm. Technology has a key role to play in normalizing this activity.

With a shared software platform, senior leaders, sales managers and reps become used to checking in more frequently with each other to clarify expectations; provide feedback, to discuss their 'more of/less of/future focus' and agree development needs and actions planned. The multiple human touch points are recognized as coaching opportunities to take advantage of; specific coaching one-to-ones, or small team gatherings, phone calls, field sales days, quarterly meetings; etc. Coaching software positively reinforces a coaching culture; for example, by driving coaching calendar management, self-assessment, manager (and possibly peer or customer) assessment, recording of agreed development plans, sales metrics, etc. , and critically by providing real-time integrated data on these across teams, regions and markets.

Once regular effective coaching is established managers become much better at recognizing and taking advantage of 'coachable moments' and individuals become much more open to accepting the advice and motivated to recognize and manage their own performance.

# 3 Standardized coaching processes lead to better conversations

Coaching program technology is the key to delivering standardization across coaching interactions - simplify, implement and standardize your coaching and Sales Model

In an average month, our sales managers definitely spend adequate time coaching each individual on the sales team



Many of us will have experienced as managers or reps the traditional coaching performance review, where an appraisal is conducted, filed somewhere and never seen again until perhaps the following year. This is never adequate and one key workforce trend is the demand for more frequent and better performance conversations.

World class organizations know that using technology to make the coaching process as administratively simple and easily accessible as possible to their salesforces, helps embed a coaching culture as a living process. A single platform which holds training materials, creates bespoke training plans, instant reports on sales teams achievements and skills gaps, means that training becomes a simple normalized process, boosts dialogue and delivers tangible results.

Managers are held accountable for holding great conversations and given the development support to do so and leaders are intolerant of those that won't. The days of lone coaching word docs left hidden on a managers laptop or shoved in a drawer or until HR calls are over.

# 4 Use it or lose it; training must be regularly reinforced in the field to develop competence

## Coaching technology reinforces positive behavioral change

*A Gallop study found that 87% of sales rep training is lost without good follow-up and reinforcement through coaching from Managers.*

In the past and quite probably in the present, companies would regularly apply blanket classroom training across sales teams. There was little accountability or interest to track if reps actually applied their classroom learning in the field, let alone if managers were consistently coaching for reinforcement. Industry research has proven training that is not followed up and individualized is simply a waste of hard earned dollars.

A technology platform ensures that managers, Reps and other relevant parties such as Sales Training and Field Force Effectiveness have instant access and visibility to exactly what is being coached and why. Leading organizations are investing in technology to ensure that post training, field based knowledge reinforcement and the relevant associated training and metrics are constantly at the fingertips of their sales teams.

The right coaching program technology helps organizations bridge the gap from 'training' to 'learning'. Application of training can be built into agreed development plans, progress can be tracked against applied learning metrics; supporting interactive development guides and competency definitions can be accessed at the touch of a button giving reps and managers the tools to take control of their own development.

Most importantly, reps, managers and senior leadership gain crucial visibility of Field Coaching and the progression towards goals and training. ROI improves drastically.

# Skills and behavior gaps mean more than half of sales reps don't meet their quota

Coaching technology enables gaps to be assessed and addressed according to corporate goals

*94% of World Class organizations know why their top performers are successful.*

*Source: CSO Sales Insights Best Practice 2016*

CSO Insights research found that a full 57% of sales reps did not meet their quotas in 2015.

Further research has identified that 87% of the revenues from complex B2B sales are generated by just 13% of the sales population. More positively, the Sales Executive Council identified that a 19% increase in sales is possible by improving field sale force interaction with customers. World class sales leaders understand the skills and behaviors that make the difference and using technology enabled coaching programs helps them ensure they select the right people and develop them to maximum effect as swiftly as possible.

Successful sales people systematically create unique value for their customers. The greater value a rep adds to customer interactions, the greater their insight into the customer and ipso facto the greater their ability to positively impact on future customer behaviors becomes.

Key skills and behaviors such as innovation, collaboration, agility, long term thinking have become much more important than technical product knowledge.

Scarily, "more than half of buyers' perception of a company's brand is based on interactions with sales professionals" according to Tim Sullivan, Director of Business Development SPI. No business can afford not to grow the value-selling capability of its salesforce, period. An effective, technology enabled coaching program empowers managers to assess the skills and behaviors of top value-sellers and, coupled with desired business direction and goals, translates them into a formal methodology to raise everyone's game. Reps have easy access to guideposts to monitor themselves against the defined behaviors and skills identified and sales managers can partner with their teams to review results and focus their coaching efforts on areas that make a tangible difference.

Senior leaders can readily see progress being made and use the powerful data obtained to view the bigger picture and offer praise to the improvers.



# Teams and individuals behave according to what they believe their leaders value

Coaching technology helps incorporate clear definitions of behavioral proficiencies to avoid ambiguity and re-inforce the benchmark

The majority of managers and representatives work hard and direct their efforts towards what they believe their organisation values. So, does your metric system drive the right behavior and actions?

There are common dangers; metrics can be set in isolation such that individuals cannot relate them to the stated business strategy so choose to ignore them; or they are too generic such that an individual feels no ownership of them; or they are simply a desk exercise that bears no relationship to day to day life on the job. Worse still are metrics that drive the wrong focus (purely coaching to the numbers for instance) which can lead to unintended consequences that are discovered too late. Technology provides priceless, dynamic reporting in order to analyse individuals proficiency across capabilities and profitability to maximise the potential of future sales interactions with customers.

By embedding the specific measures of key behaviors and skills that have been identified as driving business success and setting metrics aligned to these progressions, organisation can actively track and swiftly adapt if results are not being achieved or a negative impact is being seen elsewhere as a consequence.

# The 'Peter Principle' need not be inevitable

Coaching technology enables the recognition of future talent empowering your sales force to push past proficient

*“Too many organizations still promote high performing sales people into leadership roles without training and support.”*

*Jurgen Heyman,  
Global COO SPI*

This principle puts forward the theory that individuals are selected for promotion based on performance in their current role, rather than on abilities relevant to the future role. Thus, employees only stop being promoted once they can no longer perform effectively, once they “rise to their level of incompetence.”

Academic research continues to support the reality of this theory and findings suggest that a lack of dynamic management development is often a cause for an individual's failure. In a sales environment, poorly performing managers have a very real impact on results, so making sure the right individuals are promoted and getting up to speed in their new role as swiftly as possible makes commercial sense.

A technology-enabled coaching process and data driven reporting system enables future talent to be recognized and nurtured both more objectively and faster by identifying which skills, behaviors and aspects of performance demonstrate potential to grow and in which direction (for example into sales management or key account management). It provides the data for management to differentiate between top sales performers and future sales management talent helping avoid expensive and disruptive promotion mistakes and leads to better retention of talented individuals.

It also offers the opportunity to find alternative ways to recognize top performers who do not have the desire or potential to progress further 'up the ladder' such as developing roles around an individual's particular strengths and talents, or giving alternative recognition opportunities.

Individuals with potential can be nurtured while still in the rep role. Development goals and coaching can be seamlessly tailored to grow individuals into their new role as swiftly as possible on promotion

# 8 Senior leadership need to live and breathe the coaching culture too

Coaching technology provides data to support senior leadership to reward the correct behaviors; Inspect what you EXPECT

*If there is one thing to do in 2017, it is to adopt a more data-driven approach to salesforce development. Ensure you have valid competency models and then use them.*

*Robert Kerr,  
VP Innovation SPI*

How do leaders demonstrate commitment to a coaching culture vision and the values it embodies? Simple, by consistently demonstrating through their actions their belief in it and by focusing on actions that support its delivery.

This is often easier said than done, but active involvement via a technology platform provides real opportunity. For example, leaders can demonstrate their commitment through proactive setting of expectations and assessment of the coaching development needs through focus on the data-driven insights at National, Regional and Team levels. Data allows comparisons to be made, bias to be called out, and the organizational definition of sales excellence to be created and understood. This data-driven approach allows leadership to rapidly identify and address critical behavior and skills gaps, to focus on key coaching and training opportunities and to measure their results.

Importantly it enables leaders to identify who is advancing and who is not, to recognize and retain talent and to direct their recognition and reward in a way that reinforces desired values and behaviors across the salesforce. The improvements in the quality of decision making and supported execution dramatically enhance the chances of success and improve ROI in people resources.



# Individuals need to trust their organization and its managers to deliver high performance

Transparency and Visibility are the foundations of shared objectives

*Companies with the highest employee engagement scores deliver operating margins 170% above those with low engagement scores and the biggest impact on employee engagement is trust in management.*

Dr David Rock of the Neuroleadership Institute published his widely-respected SCARF model 2008 based on his years of extensive neuroscience research. His work has shown that individuals' level of motivation in the workplace is driven by their relative perception of risk and reward.

Minimising the sense of threat, and maximising the sense of reward, that comes from issues related to status, certainty, autonomy, relatedness and fairness leads to high motivation and performance. At the root of this, in leadership terms, is developing trusted relationships between individuals, their teams, managers and leaders; i.e. delivering a coaching culture.

Technology plays a key role in building trust through promoting collaborative working practice and open interactions, by enabling agile action planning, encouraging ongoing feedback willingly provided and received, and delivering supported development.

Trust grows when the focus is less about the process and more about the conversation, less about measuring the past and more about doing better in the future, less on addressing weaknesses and more on building strengths, less about ratings and more about improving, less individual and more team focused.

Trust delivers an environment of continuous development and delivering the best possible performance even when times are tough.

# It's the quality of sales force leadership that really determines sales performance

Coaching technology gives First Line Managers the tools to drive success

*If there is one thing to do differently in 2017 it is to quit taking a half-hearted approach to sales management development. These are the people who will lead your front line.*

*Jurgen Heyman Global COO SPI*

Sales management roles are evolving; field sales managers need to be better leaders of their teams and effective coaching needs to be a core part of their role. They need to understand the elements of sales force coaching that make a tangible difference, the competencies they personally need for success and their own targeted development program to help them to become the best coach they can be.

Technology helps them to actively manage their coaching time, assess their own coaching skills and behaviors, access learning support, and use data to recognize their own biases (eg: are they spending too much time with high performers?)

Could they be spending more time coaching competent reps so they can become excellent? Are they spending enough time with new hires to get them up to speed quickly?) The good news for managers is the more they coach, the faster their skills develop, the more their reps improve, the more their desire to coach grows.

Sales Managers who partner with their reps as a team coach in the field of play, enable individuals to see how they can use their strengths to best effect, help them build their skills and change their behavior for greater success and regularly recognize and celebrate their achievements. In turn reps too, become more invested, committed and engaged.

A sales performance coaching technology platform empowers Senior Managers, First Line Managers and Reps to finally see their goals from the same perspective. And performance data drawn from the whole or selected areas of the organization gives everyone insight into personal, team, regional and national performance.

Invaluable insights give rise to enhanced performance.  
Connect. Align. Transform



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