Coaching Using The Sales Report

TAKING THE NEXT STEP

Congratulations! You've taken the first vital step in showing that you are a champion within your organization that wants to make a difference in your sales department. Your employees have taken the on-line DISC Sales assessment. Now what do you do with all the information that you have?

The next step involves you, the sales manager, taking time out to schedule some one-on-one coaching with your employees. Now that you have helpful and useful information about how to better motivate, communicate, and challenge your employees, you don't want to make the mistake of simply putting this information on your desk and not doing anything with it. You need to discuss this profile with your employee so that opportunities are provided for the individual, their sales team, and the organization as a whole.

This guide was created to provide information on how to conduct a sales coaching session. Included in this coaching guide are suggestions for setting up the session, points that need to be included, and ways in which you can follow up.

WHAT IS A COACHING SESSION?

A one-on-one sales coaching session with your employee is a very different kind of conversation between you and your employee. It is designed to improve rapport, to open communication, and to create a partnership between the two of you. Many employees have reported that the sales coaching sessions that they've had with their sales managers after having taken the Sales assessment was the most useful discussion they've ever had about their sales development.

These are very productive sessions because they are mainly about the employee and their report. The employee is in a sense "in control" of the meeting. The emphasis is focused on the future and what you and they, working together, can do to make the sales department of your organization more successful.

This session is unlike a traditional performance appraisal or yearly evaluation. This session revolves around the Sales report, and is mainly focused on skill improvement, better use of the employee's talents, and job satisfaction. There is no overall rating that becomes part of your personnel record or affects your salary. Thus, the climate of the session is comfortable and the tone is supportive and optimistic, which is vastly different from the anxiety, tension, and defensiveness so common during evaluations. This meeting focuses on the future, not the past!

During this sales coaching session, you and your employee will have an open, two-way conversation about their profile. Your employee's perception of how they see themselves in the workplace will provide you with valuable insights into how you can better motivate and support that employee. When the session ends, you and your employee will have agreed to specific actions on how the employee can better use their talents and abilities to make more sales. This will help the employee achieve more of their career goals and improve job satisfaction. You'll periodically review your employee's action plan to ensure that the results you seek are being attained and to plan for further professional growth.

SCHEDULING YOUR SALES COACHING SESSION

You should schedule your coaching session to occur as soon as possible after your employees have taken the Sales assessment. You should schedule your coaching session to take place within the next week or week and a half after the assessments have been taken. When you schedule the session, tell your employee that you look forward to meeting with them and look forward to hearing their feedback concerning their assessment.

Arrange to hold the session in a meeting room or some other neutral place. If the discussion is held in your office, it looks as if you are more apt to be conducting a performance appraisal or evaluation. It is also recommended that you not schedule the session over lunch.

Schedule a 1 to1½ hour meeting. Make sure, however, that neither of you has a later appointment so that the meeting can continue if necessary. To avoid interruptions, hold phone calls and take other precautions. You want your employee to feel as if they have your full attention, and that this meeting is important enough that it shouldn't be interrupted.

Never combine a sales coaching session with another meeting. Adding agenda items that aren't relevant to the report greatly reduces the effectiveness of the report.

STEPS OF THE COACHING PROCESS

Step 1: Getting ready for the session

It is very important that before you have the session with your employee that you are totally prepared. It is essential that you provide the appropriate information and instructions during the coaching session. To help prevent any misunderstandings or uneasiness during the session, make sure that you've completed the following points before starting your sales coaching journey:

*Make sure you have sufficiently read through the employee's profile and highlighted information that you would like to discuss.

*Fill out the Skills Matrix Worksheet on the employee that you are meeting with.

*Fill out the Manager's Worksheet on the employee that you are meeting with.

*Find out about all the possible resources available to help the employee such as training, sales books, seminars, etc.

*Send an e-mail or leave a voice message for your employee the day before the scheduled session just to make sure that they will be in attendance. Make sure to include in this contact how much you're looking forward to the session.

Step 2: Setting the tone for the session

When arriving at the session, many employees will believe that they had to "bare their souls" when they took the assessment prior to this coaching session. They will see the session as a time where you, the sales manager, will take their assessment and pick them apart. It's essential that you start the session out on a positive tone. Your opening comments set the tone for the entire session. It's all right to begin with casual conversation, but make it brief. You want to demonstrate that you're ready to hear from them and that you're interested in what feedback they have concerning their report.

Step 3: Setting the guidelines for the session

Setting proper guidelines for the session will help ease the tension of the session. Give the employee a chance to ask any up-front questions, or voice any concerns. Make sure that when you are setting the guidelines for the session that you include the following points:

*This is being done to help the employee achieve their sales goals, not just because there is a problem.

*The best results are achieved when it is an open, honest process.

*All action plans will be mutually agreed on.

*The individual can call a time out at any time.

*Ask if the individual has any concerns about the process and try to address those concerns up front.

Step 4: Exploring the Sales Report

Now that you've taken the time to set the tone of the session, and present the guidelines for the session, it's time to dive into the report. You, the sales manager, and the employee should have a copy of the report in hand. Read through each section of the report together. As the individual's manager, take time to note areas that you have either personally observed or have been given feedback on regarding the person you are coaching. Remember to take both the positive attributes, as well as the ones that are developmental opportunities. On ones that raise a question or do not seem correct, take a pen and mark them for further investigation and discussion. As you both read through the report, be asking yourself such questions as these:

1. What can I do better to communicate with the individual based on the Do's and Don'ts in the Checklist for Communicating?

2. How does the Ideal Environment compare to the Actual Environment?

3. Based on the report, have I been managing and motivating this individual in the most effective way?

Step 5: Comparing the Manager's Sheet

Now that you've gone over the report, it's time to compare the Manager's Sheet you filled out with your employee's responses. This part of the session will undoubtedly be a great way to really get to the "core" sales needs of your employee. Your employee's have actually taken the time to write in their thoughts and feelings regarding what they should and shouldn't be doing. As you go through each of these questions, feel free to share as the employee's sales manager what your perspective is regarding these matters. If the employee isn't used to opening up and vocalizing what he or she feels, this is an excellent opportunity to let the employee talk.

Step 6: Comparing and analyzing the Skills Matrix Worksheet

Now that you've gone over the Manager's sheet and given the employee a chance to vocalize what they should and shouldn't be doing, it's time to discuss the Skills Matrix Worksheet. Begin by saying something like, "You and I mostly agreed when rating the skills, but there were a few differences. Do not begin your discussion by pointing out areas where your employee ranked low. As you and your employee go through this sheet, identify areas where the gaps are the greatest. Also, document the strengths and make sure you reinforce those. It is important that you validate your ideas by documenting specific examples you have personally observed that support your conclusions. These examples will help in the discussion and feedback process. It will be helpful to ask yourself these three questions as you are going through the exercise:

1. What work situations were they thinking of when they rated themselves?

2. Who is someone you would describe in the workplace that rates high on this scale?

3. What behavior must you see in the employee to change your perception?

Step 7: Creating an action plan

Now comes the exciting time! You and your employee will together come up with an action plan that you both agree on. After you've reviewed all the information, write out an Action Plan. The following are guidelines that you need to keep in mind as you create the plan:

*Be specific about what you are going to do.

*Set deadlines as to when you are going to schedule a sales review with your employee.

*Make sure the plan is realistic in terms of what you both want accomplished and when. Do not set yourself up for failure.

*Go public with the plan. Encourage your employee to share their plan with others so they can help maintain commitment and measure progress.

Step 8: Following up

Now that you've put an action plan into place, do not think that it's the end of the coaching. In reality, it's just the beginning. You will need to schedule a follow-up session in three or four months.

MANAGERS WORKSHEET

The following items are a part of the action plan contract and need your input as the individual's manager during the Development Discussion. The items are written exactly the same way as on the individual's form.

Fill out the questions below on your perception of the individual's work. Other questions on the contract are not included because they are for the individuals to determine for themselves.

AREAS FOR IMPROVEMENT

List three Areas for Improvement from your report and list them in order of importance.

Areas of Improvement	What I Need To Start Doing To Achieve Success	What I Need To Stop Doing To Achieve Success	The Success, Or Outcome, I Expect
1.			
2.			
3.			

a. What obstacles or barriers could prevent you from making these changes?

b. How can you work around or remove these barriers?

OTHER ACTION ITEMS

1. What workshops, training programs, books, self-development activities, professional associations, etc., are you aware of that can support further development of your strengths?

2. Who in your personal and professional life can help you accomplish these action items? And how?

3. In the implementation of this contract with yourself, what one thing will signify that you have reached a major milestone?

SKILL AREAS

Skill areas should be defined and training determined in areas of need. Skills are now required beyond the "job" function and the group or team working together should be responsible for determining who needs what and providing as much training as possible on-the-job. Skill enhancement in the areas below should be considered, as training needs are determined.

1. **The System**
   a. Understanding the needs of customers and stakeholders
   b. Understanding processes
   c. Quality and continuous improvement
   d. Connection of all goals to the organizational strategy
2. **The Business**
   a. Management by the Balanced Scorecard
   b. Strategic planning and goal setting
   c. Measuring results and graphing
   d. Financial budgets
   e. Use of common language
3. **The Team**
   a. Interventions and dealing with conflict
   b. Roles and responsibilities
   c. Time and resource management
   d. Project management
   e. Team meeting tools and techniques
   f. Problem solving, decision making, and consensus
   g. Team building and team development concepts
4. **The Job – what we were hired to do**
   a. Technical expertise
   b. Multi-skilling (learning other jobs)
   c. Training others
   d. Developing proficiency
5. **The Individual**
   a. Self leadership and personal responsibility
   b. Applying basic principles of behavior
   c. Strength comes from respecting and understanding behavioral style differences
   d. Using behavioral style flexibility
   e. Accepting and giving feedback

SKILLS MATRIX WORKSHEET

Name________________________________

Skill Area____________________________

SKILLS	LEVEL REQUIRED	CURRENT PERFORMANCE LEVEL
1.______________________________	1 2 3 4 5	1 2 3 4 5
2.______________________________	1 2 3 4 5	1 2 3 4 5
3.______________________________	1 2 3 4 5	1 2 3 4 5
4.______________________________	1 2 3 4 5	1 2 3 4 5
5.______________________________	1 2 3 4 5	1 2 3 4 5
6.______________________________	1 2 3 4 5	1 2 3 4 5
7.______________________________	1 2 3 4 5	1 2 3 4 5
8.______________________________	1 2 3 4 5	1 2 3 4 5
9.______________________________	1 2 3 4 5	1 2 3 4 5
10._____________________________	1 2 3 4 5	1 2 3 4 5

Level 1 **Cannot perform skill but has limited understanding**
Level 2 **Can perform skill with assistance**
Level 3 **Can perform skill without assistance**
Level 4 **Can perform skill and is proficient**
Level 5 **Can teach skill to others**

For maximum benefit, this skills matrix should be completed in a development discussion. Individuals could also fill out individually, along with their manager, and then compare answers and discuss development opportunities.