The UNCOMMON SENSE Sales Leader's Coaching Guide

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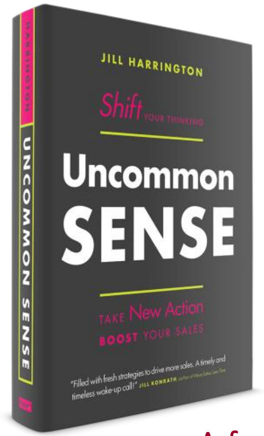
sales shift

Shift your thinking...Shift your sales results

INTRODUCTION



This Coaching Guide is written as an accompaniment to Jill Harrington’s book, *UNCOMMON SENSE: Shift Your Thinking. Take New Action. Boost Your Sales.*

This document is ***not*** intended to be a “stand-alone” leader-coach skills development tool. If your leadership team is interested in specific training to develop superior coaching skills, please see page fifteen for how to access our Sales Leader Coaching service and / or our full-day sales leader coaching skills lab: “Leading a Peak Performance Team.”

A few important reminders about the role of a sales performance coach:

- Coaching is fundamentally about facilitating change towards desired results. It is the most effective method to accelerate people’s development in areas important to them and their work.
- Coaching conversations are collaborative and engage with the “who,” not just the “what” and the “how.”
- Coaching is developmental versus evaluative. A coach creates an environment that is non-judgmental, and one in which the salesperson feels heard.
- Feedback, reflection, inquiry for deeper awareness and action planning are essential to the coaching process.

The book, *UNCOMMON SENSE*, is written in a format that may be used as a leader-supported coaching or salesperson self-coaching tool.

As a reminder, chapter one introduces the reader to the foundational mind shifts required to succeed in today’s sales environment.

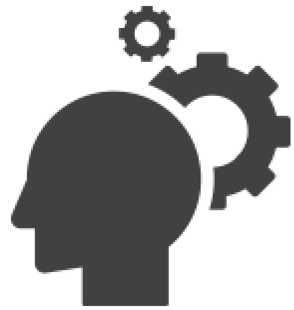
Chapters two through seven apply this renewed thinking to each of the steps in the sales process.

Chapter eight provides insights to an important trait of highly efficient sellers: Disciplined self-management.

You may use the book to coach individuals or, where there is a systemic need, to coach the entire team in your meetings.

PREPARING TO BE A COACH

Re-visit the content of chapter one to prepare you for your role as coach:



- The coaching support you provide must be ***relevant*** to the objectives of the company, team and individual.
- Effective coaching requires you to come from a mindset of ***Always Be Curious***, not judgement.
- Your coaching conversations will ***Always Be Connecting*** back to the specific goals articulated by the salesperson.
- Use the ***LCBS framework*** to provide constructive input that *leads* with the salesperson's interests and *connects* your feedback. Talk about *specific* observed behaviors and not generalizations. *Say less* to prevent overwhelm and to assure your words have impact.
- Be prepared to ***kick off you own shoes*** during the coaching process to hear what your salesperson is saying, thinking, feeling, not what you believe they should be saying, thinking or feeling.
- Before and after a coaching conversation, solicit feedback to be sure you will ***Always Be Contributing*** relevant value from their perspective.
- Each coaching conversation is ***a once in a lifetime*** opportunity to contribute to the growth and success of the individual and the team. Make each interaction matter.

The book may be used to coach in one or more of three ways:

- **Sales process** coaching. The focus is on coaching the steps of the sales process by systematically following the chronological chapters of the book. This is particularly valuable when coaching a new sales salesperson.
- **Opportunity** coaching. The focus is on a specific client or account opportunity. The salesperson identifies a client situation or account challenge with which they need help. This may be a situation the salesperson currently faces or a past challenge that they wish to deconstruct and avoid in the future.
- **Behavioral** coaching. In collaboration with your salesperson agree upon an observed behavior (or lack of) that may be jeopardizing his / her efficiency and results. For example, the salesperson struggles to make clear connections within her recommendations and proposals. As a result, the client fails to see the solution as most relevant.

COACHING INDIVIDUALS

The following is a step-by-step process you may follow in order to identify specific needs and interests to which you may coach individual members of your team.

Step 1: Read

Have your salesperson read the book. Ask him / her to capture (suggest they highlight using different colors for each of a, b and c when reading a hard cover version) the following:

- Concepts that resonate. The "aha" moments. *"This makes sense. I need to start doing this / do more of this / do this more consistently."*
- Behaviors and actions he feels he is currently doing well with good results i.e. perceived strengths. *"This is validation for me. I am doing this well and I have tangible results to prove it."*
- Concepts and actions with which she currently struggles. *"This is a challenge for me. I need help."*

Step 2: Discuss

Schedule a first conversation to obtain the salesperson's feedback on the above and be curious about their responses.

- Get clarity on ***why*** certain concepts resonated with him and how he wants to move forward with this thinking.
- Make a note of where she believes she has strength. Have you seen evidence of this? Acknowledge her for it. Make a note of each salesperson's strength, as this is valuable information to leverage in sales meetings, peer–peer mentoring, and the gathering of motivational success stories.
- Make a note of where she is struggling and plan to work with her on this in your future one-ones.

Step 3: Act

Mutually agree on specific development goals and where he /she would like to start. This is a now a foundation for future coaching calls, one-one meetings and joint sales calls.

Co-create a relevant actionable assignment with a timeline to report back. This assignment may take a number of formats, for example:

- Review of specific sections / chapter of the book.
- A role-play of the situation.
- A field exercise on which you may ride along. If you are not on the call, ask the salesperson to report back.
- Have the salesperson shadow, or partner with, a colleague with strength in this behavior or skill.
- Have the salesperson chair a roundtable discussion on the issue at an upcoming team meeting.

Have the salesperson take note of their successes and challenges when executing the assignment.

Step 4: Reflect and Learn

- Be sure to solicit the salesperson's input on their experience. What worked? What did not? How did the salesperson feel? Confident? Awkward? Unsure? If applicable, what was the client's reaction? What did the salesperson learn from the experience? And how does he want to build on this?
- Provide your own observations and input.
- Revisit the relevant chapter or pages in the book with them as appropriate.
- Commit to a next action to build on their development.

A WORKING EXAMPLE

Jane has read the book. She shares that she struggles with the "access" phase of the sales cycle and is seeing poor results on her prospecting efforts. The LCBS framework and the concept of a drip campaign hit home for her.

As her coach, be curious. Use the book content to gain clarity on the root cause of her challenge. It could be one (or more) of several reasons.

After some discussion, for example, you may agree that her greatest challenges are:

1. Inability to create messages within the LCBS framework because of a lack of understanding of her market i.e. unsure of what is TOP of mind to her prospects.
2. She feels overwhelmed. And is therefore choosing to respond to incoming marginal opportunities over proactively seeking out and preparing focused messages for VIPs.
3. She struggles to maintain momentum in the prospecting process because she feels she has nothing new of value to say.

First, review together why it is so important for Jane to work more efficiently when prospecting.

Collaboratively decide a course of action and identify the support required from you and / or her peers.

For example, you might:

- Suggest Jane first revisit specific chapters of the book and come back with implementable ideas. For example, chapter eight will help her identify methods to better manage her time and attention. Chapter two will refresh the LCBS process. Chapter three will help her build the content of a relevant drip campaign.
- Together review what Jane knows about her market and how she can fill in important gaps. Use this information to help Jane improve or rewrite some of her current sales messages in context of the LCBS framework. Alternatively, pair her up for this exercise with a colleague who already does this well.
- Get the entire team involved in clearly defining a VIP profile and / or developing an *Access Arsenal* that contains content from the entire team and that helps assure momentum in a prospecting campaign.

Obtain Jane's commitment to take specific action with a finite timeline. Set the date for your next meeting and have Jane report back. Hold the standard by assuring Jane is accountable for her commitment to act.

TEAM COACHING

Team meetings often comprise rote agendas that may be better addressed via e-mail or other methods. Leverage this community time to focus on strategy development, collaboration on difficult customer scenarios, reinforcement of new skills, and sharing best practices.

Use the book content to identify and prepare opportunities for scheduled group coaching exercises in team meetings. If you are committed to taking on the role of coach be cautious not to take the lead in discussions or get caught in "advising" the group until it is clear the team needs your feedback.

You may choose one of the three areas of coaching mentioned previously:

1. **Sales process coaching:** Select a step in the sales process which the team needs to strengthen.
2. **Opportunity coaching:** Have one salesperson bring a customer situation to the meeting.
3. **Behavioral coaching:** Agree to a behavior the entire team would benefit from practicing.

Pre-meeting:

- Clearly articulate the focus and end goal for the team exercise.
- Assure any pre-read material goes out ahead of time with the requirement that everyone must come to the meeting prepared to contribute. For example, if this is an "opportunity" coaching exercise be sure the owner of the client situation provides a client briefing document ahead of time.
- Specify the relevant chapters from the book to pre-read so that the team comes ready to share ideas.

During the meeting:

- Use every exercise as an opportunity to coach ***all*** team members. For example, if Jim is looking for help with a stalled client situation, notice if teammates are being curious or simply jumping to solutions before gaining a full understanding of the client situation.
- Help the entire team, strengthen their curiosity muscle and see firsthand why ***Always Be Curious*** leads to a number of smarter solutions.
- Assure everyone has a voice.
- Have the team brainstorm multiple possible paths of action.
- Have Jim agree and commit to a path of action.
- Ask each team member to share what he or she learned from the process, and what he or she commits to doing differently in the future.

Post meeting:

- Based on the learning from the exercise have each sales person act and reflect on the results.
- Have them come to a future meeting prepared to share their results along with the learning from this new action.
- Use this meeting to course correct as necessary and continuously build on any positive change.

SAMPLE TEAM EXERCISES

There are multiple ways to develop team exercises from the book. Some chapters provide specific suggestions. I encourage you to get creative relative to the needs of your team.

Always have your salespeople pre-read relevant pages of the book to generate fresh thinking. This assures a more productive conversation and the best use of everyone's time in your meetings.

Below we have provided examples (by book chapter) of interactive team exercises you may conduct in your meetings. If you would like help developing further relevant team exercises, or if you would like Jill to facilitate the process for you, please contact us at results@salesSHIFT.ca.

Chapter 1: MAKE THE SHIFT

Sample Exercise: Opportunity strategy session using the ABCs.

An effective way to create awareness of proficiency in the important shifts outlined in Chapter one is to use the earlier example of Jim's stalled client in a team meeting.

Everyone pre-reads Chapter 1.

Have one salesperson volunteer to bring a difficult client situation to the meeting. Have this salesperson send out detailed background information, along with their discovery notes, as pre-read material. Have them articulate the help they are seeking and the specific desired output of the proposed team discussion.

In the meeting, get into the mindset of coach rather than contributor. Be the catalyst for the team's growth. Notice how the team contributes to the strategy session:

- Are peers curious to fill in gaps in Jim's information before they jump to solutions?
- Are people considering the situation from both the customer's and the seller's point of view. Or are they stuck in the "seller" mindset?
- Are they connecting back to what is important to the customer?
- Is each person contributing relevant value, or simply wanting airtime?

Make notes of specific behaviors … the good, and those that hinder the process. Once the team discussion of Jim's challenge is complete, be sure to debrief on the process of getting there. Ask for the team's input on how they approached the session. Provide your input making reference to the content of chapter one.

Chapter 2: ACCESS

Sample exercise: Prospect prioritization strategy.

Have the team pre-read pages 34 – 39.

Facilitate a round robin brainstorming session to obtain answers to the five VIP criteria on page 35 and to develop a company VIP profile. Help individuals identify their personal "a" advantage.

Following the meeting have each salesperson execute the following:

1. Review their current prospect list to identify potential VIPS.
2. Identify current advocates who may be in a position to introduce them to other VIPS.
3. Decide where they need to focus their efforts on and off line to be indirect line of sight of these Very Important Prospects.
4. Create a handful of qualifying questions to filter incoming leads to separate the VIPS from less desirable / winnable leads.

Sample exercise: Create your ticket to access.

Pre-read pages 40 – 48.

Ask each salesperson to conduct TOP of mind research on a specific VIP contact, role or industry. Ask each person to write and bring to the meeting an introductory prospecting message to this VIP contact or role.

Put people into pairs and have them analyze each other's message in context of the LCBS framework. With their partners input, have them strengthen their message. Have each person share what they learned from the process. And have them share strong examples with the whole group.

Have each person commit to take action to build on this exercise when in the real world. And report back on their success.

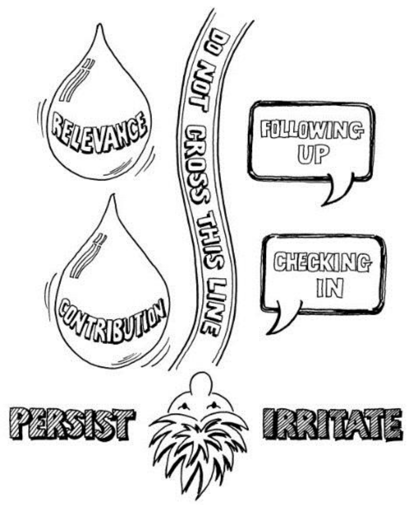
Chapter 3: ENGAGE

Sample exercise: Build an Access Arsenal.

Pre-read pages: 62 – 64.

Prior to the meeting, ask each salesperson to submit something of relevant value that has helped them gain a response from, or access to, new contacts in the past. At the meeting:

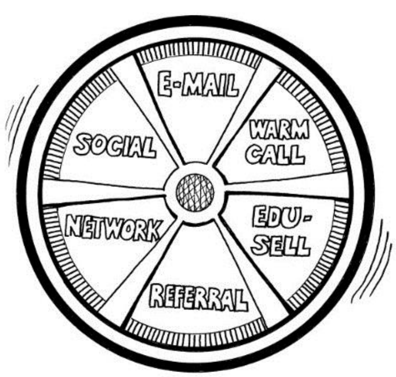
1. Brainstorm different ways the team may use these items in their prospecting messages and activity.
2. Decide where best to post / file these valuable prospecting tools to assure access to the entire team. This will be your Access Arsenal.
3. Identify any gaps… What other relevant items could be housed in your Access Arsenal?



Assign an owner(s) of the arsenal. Their role is to schedule reminders for everyone to regularly submit ideas and items. And reminders to ***use*** the arsenal as a go to resource for creating high value messages.

Sample exercise: Leverage the wheel of prospecting.

Pre-read pages: 65 – 80.



If you are not doing this already, have the team track the initial trigger for sold new business.

Which of the six elements of the wheel of prospecting initiated the first conversation in the sales process? A voice mail, email, referral? A networking event or social media post? A marketing partnership? Perhaps a specific educational article someone sent out. Analyse which methods, or combination of methods, are driving results for you and as a team. Have team members share best practices for leveraging these most productive spokes of the wheel in your meeting.

Chapter 4: UNDERSTAND

Sample exercise: Strengthen your Four Quadrants of discovery.

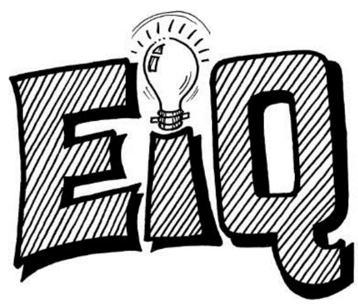
Pre-read pages: 85 – 91.

Have the team share their most valuable "go to" discovery questions prior to the meeting. In your meeting whiteboard the Four Quadrants and insert the key questions, eliminating any duplication. Notice which, if any, of the Four Quadrants are weak. Have the team fill in any gaps to assure a foundational questioning blueprint for future discovery calls and meetings. A blue print to which the sales person may now add specific questions directly related to an individual client situation.

Sample exercise: Leverage your EiQ.

Pre-read pages: 97 – 100.

Have a volunteer with an upcoming client discovery meeting provide a client briefing document to everyone prior to your meeting. During the meeting, have this salesperson share the questions she intends to ask in her client meeting. Ask her peers to notice if any traditional probing questions may be enhanced for greater credibility by using her client intelligence to embed Ei into her Q? Have the rest of the team provide input to strengthen her questions as appropriate.



Chapter 5: POSITION

Sample exercise: Proposal analysis.

Pre-read pages 111 – 122.

Select a proposal or executive summary and cover email / letter to send out as a pre-read. Ask everyone to bring his or her responses to the following questions:

1. Does the document lead with the customer's interests?
2. Does it follow the LCBS framework?
3. Does it connect specific value back to the customer's priorities? Or is filled with generalizations?
4. Is it formatted to make it easy to choose you? Or is the client required to wade through pages of irrelevant "stuff" in order to find what she needs?
5. What suggestions does each team member have to improve this important selling document?

Following this discussion, decide as a team what overarching improvements you plan to make to your company's proposals. Better still, involve clients and prospective clients in this process.

Sample exercise: Center line test your proposals.

Pre-read pages 117 – 119.

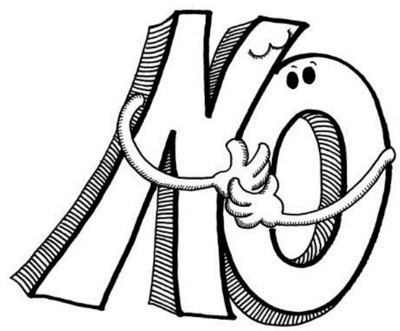
Making tight connections between your value and what is most important to the client in context of all Four Quadrants of discovery is a blind spot for many sales people. Many think they do this well. Buyer studies suggest they do not.

For an upcoming proposal, whiteboard two blank columns as outlined in the book, pages 117 – 118. Use these pages to guide your team through the Center Line test. In the left hand column ask the owner of the client relationship to fill in the client's critical interests under each of the four quadrants. In the right hand column beside each client interest, answer the question: How are we addressing this in our proposal? Look for gaps in both columns. Do you have enough information in the left hand column to submit a differentiated proposal? If not, where are the gaps, and how will you fill them? And, are there important client interests in the left hand column that have no relevant value connected from the right? Decide how you will rectify this before submitting the proposal.

Chapter 6: ROADBLOCKS

Sample Exercise: EARN the right to a future yes.

Pre-read pages: 146 – 149, 165 – 167.



Conduct the exercise at the bottom of page 149 in your meeting. Have the team identify the common negative client responses they receive when prospecting or positioning a recommendation. Have the team break into pairs or small groups. Assign one client response to each group and give them 10 minutes to brainstorm how they might use the EARN framework to move the relationship forward. Have each group role play their best recommendation for the entire team.

Sample Exercise: Convert enemies into allies.

Pre-read pages: 150 -155.

If members of the team are struggling with certain stakeholders in the decision-making process (for example, an officious assistant or inflexible procurement officer) facilitate a discussion, using the concepts in the book, to encourage the team to revisit the situation from a mindset of curiosity and the customer's point of view. How do we take a different approach to these key stakeholders? How do we learn more about their interests and priorities? How can we better support them? What can we do differently before, during and after the RFP process? Positon a bell on the table. If anyone hears a teammate default to a judgmental mindset, or a seller-focused viewpoint, they may hit the bell as a reminder to keep the discussion focused on how to cultivate these important contacts as allies.

Capture commitments to action and ask the team to report back and share success or challenges at a future meeting.

Chapter 7: RETAIN & GROW

Sample exercise: Leveraging your existing advocates.

Pre-read pages 175 – 177 and 190 – 196.

Prior to the meeting, ask each sales person to identify potential advocates within their client base and bring this shortlist to the meeting. As a team, brainstorm approaches to leverage these advocates to grow business within the account and to obtain quality referrals and impact testimonials that will help open doors to new accounts. Have everyone commit to taking action within a specific timeframe and report back on his or her results at a future meeting.

Sample exercise: Convert customers to advocates.

Pre-read pages 178 – 186.

Have the team discuss examples of how client expectations shift throughout the sales process and / or client relationship. What process does each member have in place to stay abreast of these shifting expectations? Notice if they are regularly having "no-selling conversations" that help them stay abreast of the client's shifting goals and priorities. Are they scheduling periodic "relationship meetings" that provide answers to:

"How are we doing as a valued provider?" And, "How am I doing as your sales representative?"

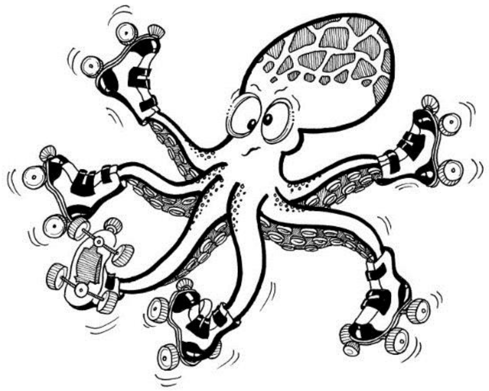
What quality of information are they receiving? How can you, and the entire team, execute on this important feedback?"

As a team, decide what action you will take to grow existing customers into advocates.

Chapter 8: DISCIPLINE

Sample exercise: Boost team efficiency.

Pre-read pages: 199 – 218.



Discuss the various approaches to focusing and protecting the team's attention to get the important sales growth activities done. Share best practices relating to managing schedules and technology. What do you want to adopt across the sales organization? Who do you need to notify of this plan?

Ask the team to execute the "three rules" for getting important projects done over a specific timeframe. Have each person capture how he feels, how focused and productive she becomes, and any challenges that prevent him or her from applying. Have each person report on their success and challenges at a future team meeting. Decide as a team how to build on any positive output.

Sample exercise: Convert a paralysing mindset into an enabling one.

Pre-read pages: 228 – 230.

Have fun with the powerful reframing exercise on page 230. Have each team member think of a sales challenge. Have them write down the challenge in a question format. For example, if the challenge is, "No one responds to my emails," the question they write might be, "How do I get people to respond to my emails?" Have each team member take turns to share his or her question with the team. Is it an enabling question? Or paralyzing? Is it seller or customer focused? Use the examples cited in the book as a guideline. Ask other team members to offer a reframed enabling version of the question. Let the person who originally shared the challenge choose the reframe they believe will help them find answers to move forward.

LOOKING FOR FURTHER SUPPORT TO DEVELOP YOUR COACHING SKILLS?

I attended school part-time for three years to obtain my professional coaching credentials. I wish I had known what I learned from that process when I was a sales manager in the corporate world. Suddenly so many of the human idiosyncrasies made sense to me. I realised that much of my time as a leader I was handing out advice or mentoring individuals on my team when I needed to step into the role of coach.

If you are seeking further support in developing your skills as a leader-coach there are a couple of ways salesSHIFT can help:

1. Hire me to be your coach. I focus on helping leaders to strengthen the "human" aspect of your role and obtain the optimal performance from each individual on your team while leveraging the strengths of the whole. My coaching process is built around your specific objectives, needs and interests… and according to your busy schedule.

2. If you have several sales managers looking to strengthen their people coaching skills you can take advantage of our full-day on-site interactive training lab, "Leading a Peak Performance Team."

For further information on our leader coaching process or training lab, please contact me directly at jill@salesshift.ca.

FINAL WORD:

Encourage your team members to use this book as a "self-coaching" tool. To use it as a refresh of how to think, and what to do … or not do … at different stage of the sales process. Repetition is the foundation of learning. When a sales person hits a challenge, have her dip back into the appropriate book chapter or section to re-assess her situation and take new action. Have her record and reflect on what she does differently; and on the results she achieves. Recognize achievements and encourage peer – peer sharing of successes.

The single intention in writing *UNCOMMON SENSE,* and providing this complimentary leader's coaching guide, is to contribute to your team's ongoing sales success. Let me know what you think of the book. Does this coaching guide help bring it alive within your team? What can we do to make this guide more valuable in the future? Please share how you and your team are benefitting.

Thank you and good selling.

Jill Harrington