

# The Revenue Leader's Guide to Building a Coaching Culture



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## Benefits of Coaching Customer-Facing Team Members

Countless research studies by Gartner, Forrester, SiriusDecisions, McKinsey, Deloitte and others prove the benefits of a sales coaching program for reps, managers, and organizations as a whole. Reps get the skills and knowledge they need to become selling machines. Managers learn how to take their 'B' team and turn them into 'A' players. Organizations see a lift in revenue and rep retention rates, plus a reduction in onboarding and ramp time.

Companies that make coaching a priority have seen results like:

- **20% higher revenue**
- **35% increase in first-call conversions to pipeline**
- **50% reduction in ramp time**
- **40% higher sales productivity per rep**

Despite the benefits, coaching reps continues to be a low-priority task at many organizations. The most common obstacles are time, ease of finding coachable moments, and knowing how to effectively coach reps. Sales leaders that want to make coaching a priority need to make it a part of their culture. This ebook and checklist will help you build a coaching culture from the ground up.

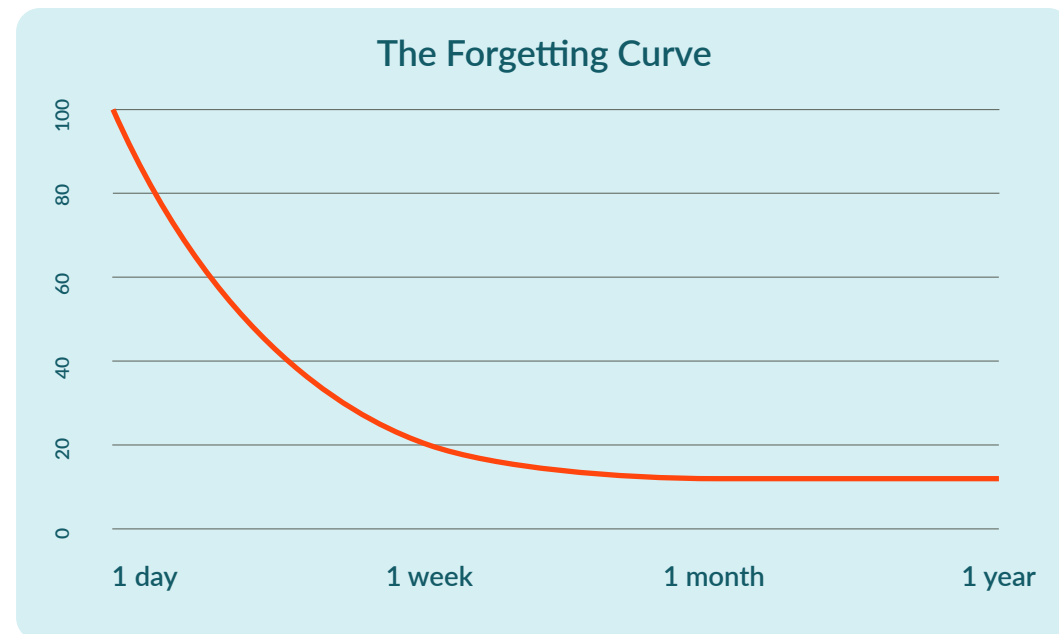
# Phase I: Identify Your 'Why'

In order to create a successful coaching culture, the first step is to identify your organization's motivations behind coaching. Culture is what people do when no one is around, so the 'why' needs to speak to more than results.



Every sales leader struggles with two things: accountability and consistency. By making coaching a priority, it helps reinforce both consistency and accountability. A coaching culture sets the expectation that coaching is not an optional item on the To-Do list. It will also keep teams aligned on messaging and what successful calls sound like.

Regularly coaching your reps reinforces sales training. Every sales leader has one common enemy: the Forgetting Curve. Research shows that reps forget 87% of sales training within 30 days.<sup>1</sup> By reviewing what was taught in training during 1:1s and group coaching sessions, your reps will retain more of the information. Eventually, this leads to mastery of the skills which then become second nature for your sales team.



1. <https://blog.hubspot.com/sales/strategies-make-sales-training-effective>

Since each organization is unique, it's important to identify what yours is seeking to get out of a coaching culture.

Work with fellow leaders to identify key quantitative and qualitative metrics you'd like to improve through coaching and development. Ask things like:

- Are we attracting and retaining the right talent?
- What does employee satisfaction look like?
- Where can we make improvements that will increase revenue?
- Can we reduce time-to-first-deal?

After you've uncovered why you need a coaching culture, review the current atmosphere and identify any roadblocks you may encounter while building this new culture. Evaluate pain points of your existing sales culture and coaching program by answering these questions:

- Do reps and managers understand the value of coaching?
- Are there any rogue managers or reps who do their own thing, but still produce results? These reps can either be isolated or challenged to adopt new methods.
- How much time does it currently take to coach one call?
- What is the general sentiment of the team? Are they generally happy at the office, or are there 'negative nancies' in the bunch?



**ACTION ITEM:** Choose 2-3 quantitative metrics you would like to improve as a result of a coaching culture.

Whether you're working on this initiative by yourself or as a management team, it's essential to remain objective while evaluating the current culture. Do you know who your current culture champions are? These are salespeople who come in smiling every day and try to create a fun environment. They are influential to their peers. They are the first people outside of leadership you'll want on board for rolling out a coaching culture.

Getting leadership bought into a coaching culture is relatively straightforward. Executives want actionable data they can use to make decisions. They want to know how to drive revenue without increasing costs.

Coaching sales reps makes them better, which ultimately leads to more closed deals.

**Over 47 percent of sales managers spend less than 30 minutes a week coaching reps on skills and behaviors.**

- CSO Insights, 2016 Sales Enablement Study

For managers, it's all about replicating top performers. Instead of having to rely on a few reps to hit their numbers, the entire team performs at a higher level. They may ask, "Where am I supposed to find the time to coach?" Be sure you have an answer by finding time in their calendars or canceling non-vital meetings and evaluating if there is a way to make coaching easier, such as **conversation intelligence technology**. Smart companies are getting their reps involved in their development to ease the time burden on managers. Peer coaching and small group coaching all play a role. The goal is to burn as few calories as possible to get the most significant business impact from coaching.

# Phase II: Define What ‘Good’ Looks Like

You can't measure what you don't know. In order to cultivate a coaching culture, the entire organization must agree on and understand the traits of a good customer-facing conversation. Without clearly outlining the behaviors, keywords and phrases, as well as the anatomy of successful conversations, it's impossible to create consistency and accountability.

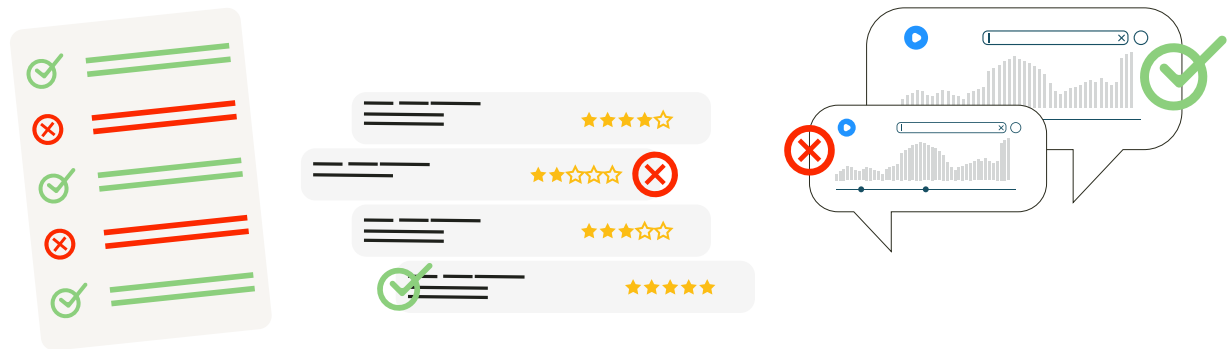




After leadership has seen the value coaching offers, you will need to agree about what constitutes a good call. It may be a challenging exercise, especially if your leadership team subscribes to different sales methodologies. Defining 'good' will require everyone to think about your sales process and call flow frameworks as agnostically as possible.

Get the entire leadership team together to create a framework of successful calls and align on the definition of 'good.' The objective of this session will be to build out a scorecard. Ask each manager to write out 5-8 of the most critical behaviors that reps should exhibit on a good call. Review everyone's responses and narrow it down to a final selection of 5-8 key behaviors. More than this will be overwhelming for the reps to remember.

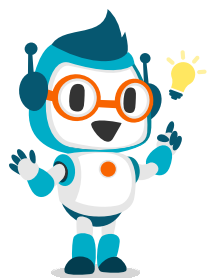
Create a rating scale such as a 1-5 Likert, Yes/No/Not Applicable, 1-3, or whatever best fits your sales organization. The name of the game is objectivity while scoring.



To align all sales leaders to a standard for each rating, play calls during a synchronous call review session. Everyone present will complete a scorecard, and you'll review answers as a group. This calibration establishes the key differences between scores and ensures that managers can easily coach one another's teams in their absence. Viola - alignment!

This exercise is also an excellent time to establish or review the baseline metrics for conversations at your organization. Identify what best-in-class is for:

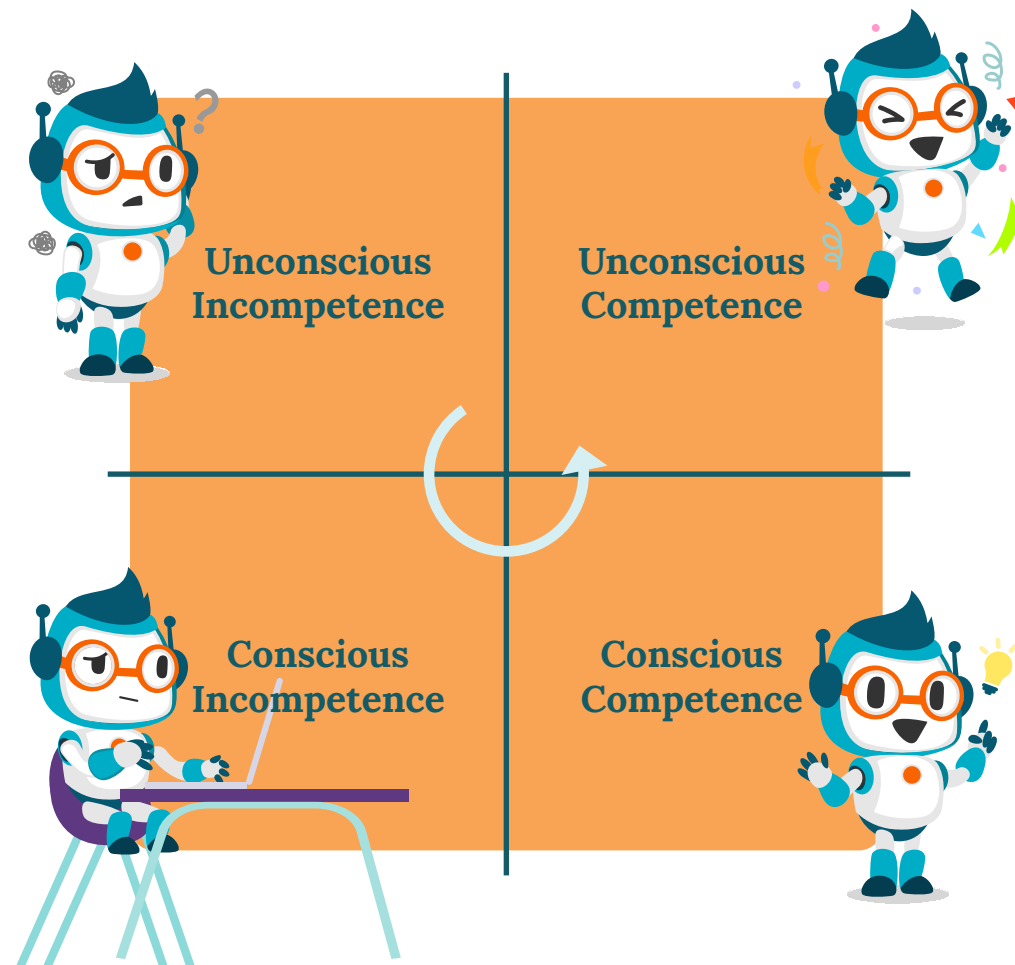
- Talk-to-listen ratio
- Call duration
- Interchanges between the rep and prospect



### **ACTION ITEM**

Mandate the use of scorecards. Make reps complete their own scorecard for a given conversation before they can see how others have scored that same conversation.

The ultimate goal is to make reps unconsciously competent—they perform the right behaviors automatically without thinking about it. Most will begin in a state of unconscious incompetence—they don't know why they're performing poorly. With coaching, they'll move through understanding why they're under performing (conscious incompetence) to knowing what to do but having to focus on completing the right actions (consciously competent).



# Phase III: Sell Your Team on a Coaching Culture

A coaching culture does not happen overnight. Once it's time to implement this new initiative, you'll need more than an all-hands meeting to get everyone on board.



Think of the last sales kickoff you attended where leadership announced a sweeping organizational change. How many groans did you hear? You want to avoid the “next big thing” approach if you truly want to shift your culture.

Instead, spend some time planning out how to announce this to your teams in a more personal fashion. A better approach starts with explaining why and how you’ll build a coaching culture as a team. This could take a town hall format or you can lean on your managers to share it with their teams. Managers have established a foundation of trust with their reps, so the message may resonate better coming from them.

The key to announcing the shift to a coaching culture is to make sure reps understand that it’s all about making them better sellers. You coach so that they make more money. Share the ground rules with them and include the rules in the coaching session calendar invites.

A coaching culture has an added benefit of building better bonds between managers and reps, and between teams. As a manager, it’s essential to know what drives each rep. Do they want to make more money, get promoted, or something else? Use that information as a driving factor for how and what you coach them on. It eliminates the “I have nothing to coach” that can happen when a rep has a particularly successful week.



## ACTION ITEM

Find out your reps' bigger goals—how can you help them achieve those through performance and sales coaching?

Lean on your influential reps that can make or break workflow, process, and culture changes. Get them excited about a coaching culture. For some teams, it may make sense to roll it out to these reps first so they can see the results and share it with their teammates. Once the team has seen proof that coaching sessions aren't for ripping their calls to shreds, they'll be more open to coaching.

A coaching culture also helps drive in-role progression. When managers and reps both know the exact steps to a promotion, coaching sessions can serve as check-ins for progress. Managers that are transparent about the promotion process will see their reps self-motivating to get to that next level.

## Managing Reps Who Reject Coaching

As with any significant change, there will be some resistance. Your seasoned reps may say, "I don't need coaching. I'm doing just fine without it." To some degree, coaching resistance can be harmless. But, you need to know how to keep it contained.

While you build out your coaching playbook, you should also establish guidelines for managing coaching resistant-reps. Define what resistance looks like, whether it's the failure to improve over x sessions, not sharing calls with managers, or ignoring feedback entirely. Work with the leadership team to agree on how you'll manage resistant reps. Consider actions such as:

- Pairing a rep with a new coach
- Isolating vocally resistant reps from the team
- Managing uncoachable reps who negatively impact the rest of the team out

Research shows that the biggest lift from sales coaching comes from the middle 60% of reps. Spend your time with these 'core performers' and less time with low performers who don't change behavior no matter how much they are coached.

The good news is that most reps want coaching. Those who speak out against coaching at first might change their mind as they see 'B' players rising to the top of the leaderboard. Be sure to encourage peer-to-peer coaching to reinforce the learning atmosphere. The only person that can decide if they want to change is the rep. Your job as a leader is to create the right environment where they feel safe to fail and learn, hence encouraging the behavior changes they need in order to grow.

# Phase IV: Build Your Coaching Playbook

Create a playbook that outlines how coaches should format review sessions and set expectations for leaders, coaches, and those receiving feedback. This helps create accountability for each party and ensures review sessions are productive.





**Playbook Must-Haves:****Format**

One-on-one, small groups, team, department

**Audience**

Rep or reps getting coached

**Coach**

Manager, SME, Senior Leader

**Duration**

How long sessions will be

**Frequency**

How often sessions occur

**Modality**

Synchronous or asynchronous

**Content**

What's being coached

First, outline what each review session should entail. All too often, sales managers make the mistake of coaching too much. When you try to cram too many things into one coaching session, reps get overwhelmed and effectively shut down to feedback.

To keep coaching-overload at bay, you need to set some ground rules. The three most important ground rules are:

1. Only coaching 1-2 areas for improvement per session
2. Leading with a positive
3. Keeping discipline separate from coaching

Next you'll want to outline what the coach and the rep should bring to each session. Most sales organizations find that having reps send 1-2 calls to their manager each week provides enough material for coaching, even if they'll be coached by someone else. Reps should complete scorecards and annotate these conversations before the review session. The coach may also listen and annotate before the session, or they may review the reps' stats to help pinpoint a topic to focus on.

**ACTION ITEM**

Have reps send their manager 1-2 calls per week for feedback and review to build a habit around coaching.

The best sales coaching playbooks will also outline how small group, team, and department-wide coaching sessions will occur. Going beyond 1:1 coaching invites collaboration and helps your sales team stay in alignment.

While building out your group sessions, consider adding coaching-based incentive programs. A Call of the Month contest is particularly effective at driving peer coaching. These contests celebrate quality over quantity and provide a nice break from the same top performers winning incentives week after week.

### How Call of the Month Works

Every rep picks their best call from the previous month, annotates it, scores it, then shares it with their manager. Each sales manager selects the best two calls from their teams and shares them with the second-level sales leader, who picks winners and runners-up. It's easy to do, takes very little time, and makes learning from the best practices of other reps a fun experience.

As a bonus, you'll be able to build a call library from these excellent call examples.



**Download The Ultimate Sales Coaching Playbook now for more ideas of what to document for your program.**

**Get My Copy**

# Phase V: Make It Last

The average tenure of a sales leader is less than two years. Here are a few ideas on how to keep a coaching culture going when personnel changes occur.



Unlike technology, a coaching culture shouldn't be subject to disappear every time a new leader joins an organization. To build something that flourishes long after the initial roll-out, champions need to pay close attention to hiring, onboarding, and training processes for reps and managers.

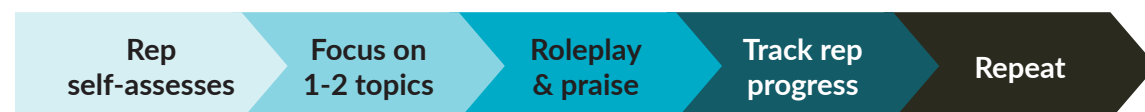
## Hiring Into Coaching Culture

Culture fit has long been a check box of hiring processes, but it's non-negotiable at organizations with a coaching culture. Managers need to know how to spot coachable candidates, those who may need some coaxing to be open to coaching, and red-flags of coaching resistance and/or arrogance.

During onboarding, make it known that coaching is a part of your culture, and be direct about it. Share why it exists and what it means for your new team members and the organization as a whole. Get new hires listening to good and bad calls from your call libraries from the very beginning.

## Making Managers Great Coaches

When new managers get promoted, or a new manager gets hired, it is paramount that they believe in a coaching culture. Teach managers how to coach using systems like observe, describe, prescribe, and the below framework:



Hold regular manager alignment sessions to ensure managers agree on what 'good' looks like. Make sure managers are adding to your coaching culture rather than working against it with poor coaching. For managers that don't report directly to you, ensure they're empowered to own the coaching culture just as much as you do. Once or twice a quarter, check-in on the language reps are using and be sure managers are still coaching to best practices.

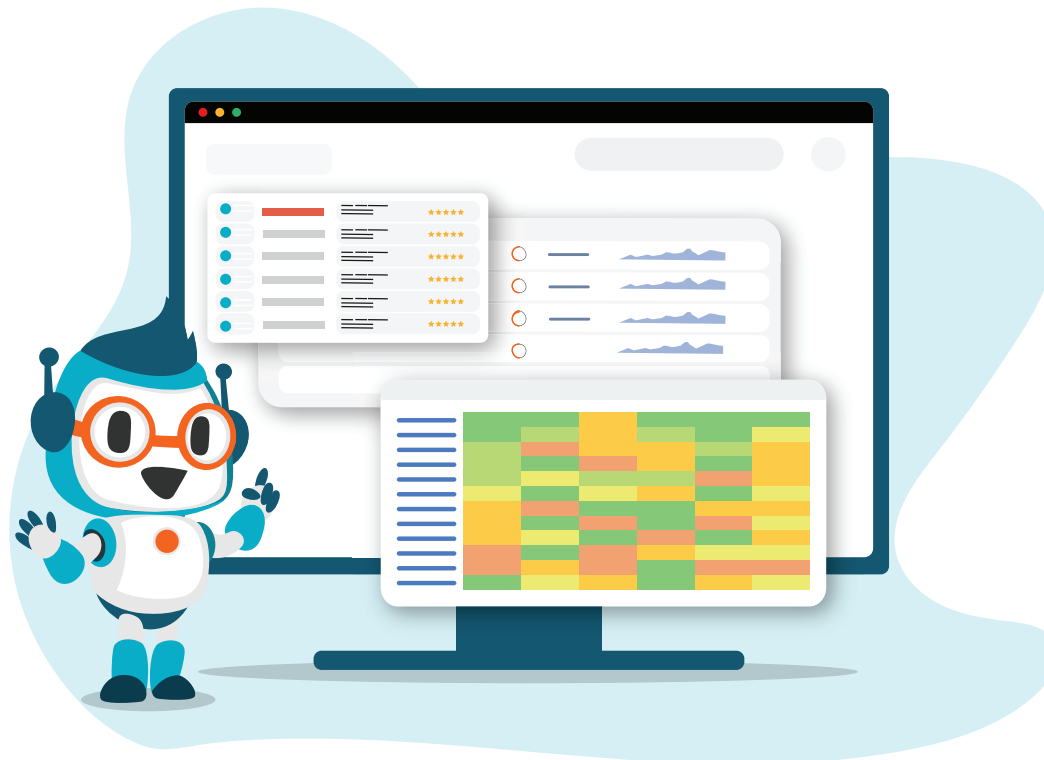
### **Keeping Reps Accountable**

Reps also need to maintain alignment on what 'good' looks like. Get your teams together for monthly best practice or Call of the Month sessions and review the elements of a successful call. You can also spontaneously ask reps to write down the different parts of a successful call to ensure they're using the same nomenclature from team to team and start class to start class. Anyone who's far off base should receive some refresher training. (Don't be shocked if many reps need additional training—remember the Forgetting Curve).

If you're building a coaching culture, it shouldn't be limited to manager-rep or rep-rep. If you are able to, encourage your sales team to coach your calls. There is always more to learn in sales and this breaks down the wall between leadership and the front-line. No one should be considered 'untouchable' for coaching unless it's for HR or security purposes. When coaching managers and leaders, the feedback should be more strategic than tactical, i.e., how did this call impact the deal?

# Phase VI: Measure & Calibrate

Remember those metrics you set out to improve by having a coaching culture? Make sure you're measuring them. Pay attention to the impact coaching has on your team's performance.



These are some useful metrics to benchmark and review each quarter:

- Average # of meetings set per month (per rep and as a team)
- New-hire ramp time
- Lift in productivity of 'B' players
- Conversion rates
- Deal progression
- Rep turnover

It may take some time to see the full ROI of a coaching culture, but that's why the metrics are so important. Knowing how your team is performing against benchmarks will also help inform any tweaks you should make to the coaching process.

Be sure to maintain consistency in your coaching cadence, even after you begin to reap the benefits. Make sure everyone has access to program documentation, including scorecards and the coaching playbook. Take action when managers aren't coaching or reps aren't sending calls to be coached. Reinforce that everyone is accountable for a coaching culture, not just the leadership team.

And when your team starts to kick some serious butt, celebrate. A coaching culture will stick when you recognize the success of your team. Congratulate reps as they move up the leaderboard.

# Conclusion

Praise managers when their whole team sees an improvement in performance. Give praise publicly and leverage stories of success from individuals to motivate the entire team. When reps see their hard work pay off, and they get recognized for it, they'll remember it and keep striving for the next level.

As you go through the process of building a coaching culture, there are a few things to keep in mind:

1. No two organizations are the same, so your coaching culture might not look the same as your fellow sales leaders'. Ask leaders outside of your organization about what's working for their sales teams.
2. It bears repeating: **A coaching culture does not happen overnight.** Don't try to force it as a quick initiative. Changing your sales culture is a group effort. Everyone needs to do their part, so it's critical to establish buy-in at every level.
3. A coaching culture is a worthwhile, long-term investment with big payoffs.

Get started building your coaching culture today with our checklist on the next page.



# Checklist for Building a Coaching Culture

## Establish Your 'Why'

- ☐ Identify 2-3 metrics for measuring the impact of coaching.
- ☐ Evaluate your current sales culture.
- ☐ Uncover potential pain points and roadblocks you'll encounter.
- ☐ Investigate the types of people on your sales team—are they generally positive or are there a handful of 'negative nancies'?

## Create Leadership Buy-in

- ☐ Build out a list of benefits and coaching data for executives.
- ☐ Show managers how it will help them hit their numbers.
- ☐ Tie coaching activities to revenue impact.
- ☐ Determine how you intend to roll this out i.e.. a select group, one team, or organization-wide.

## Clearly Define What 'Good' Looks like

- ☐ Schedule a meeting with all coaching stakeholders.
- ☐ Ask everyone to write down 5-8 of the most important elements of a sales call.
- ☐ Pare down the responses to 5-7 elements everyone agrees upon.
- ☐ Discern how you will rate these elements (1-5 is ideal).
- ☐ Play 3-4 calls and have everyone score them.
- ☐ Discuss the differences between scores and what must be present to discern between a 4 and 5.
- ☐ Identify additional baselines for ideal talk:listen ratios, call lengths, and number of interchanges per call.
- ☐ Finalize your call scorecards and create digital or physical copies to be used by managers and reps.

## Build Your Coaching Playbook

- ☐ Set ground rules for every coaching session.
- ☐ Build out a coaching cadence (best-in-class is 1 hour per rep, per week).
- ☐ Create a section outlining what 'good' looks like and what each score represents for scorecard questions.
- ☐ Identify ways to lead reps to identify on their own where they could improve.
- ☐ Determine what synchronous and asynchronous coaching sessions will look like.
- ☐ Figure out which reps to coach the most for the biggest performance lift and which reps to leave alone.
- ☐ Teach managers how to coach the right way using the neuroscience of changing adult behavior.
- ☐ Finalize your document and create physical copies for every coach.

## Building Rep Buy-in

- ☐ Determine how you will announce that you're building a coaching culture.
- ☐ Reassure reps that coaching is about making them better.
- ☐ Encourage managers to find out what drives and motivates each of their reps.
- ☐ Hold reps accountable for their part by requiring 1-2 calls to be shared with their manager for coaching each week.

## Managing Coaching Resistance

- ☐ Work with other managers to create an action plan for coaching-resistant reps.
- ☐ Encourage reps to coach their peers.

## Make It Last

- ☐ Hire coachable reps.
- ☐ Ensure managers are invested in coaching.
- ☐ Keep teams aligned on what 'good' looks like.
- ☐ Encourage coaching across the enterprise.
- ☐ Invest in coaching training for new managers.

## Measure Your Coaching ROI

Benchmark these metrics and measure them quarterly so you know if the coaching playbook needs adjustments:

- ☐ Avg. # of meetings per month (rep and team)
- ☐ New-hire ramp time
- ☐ Conversion rates
- ☐ Sales cycle
- ☐ Rep turnover

## Celebrate Success

- ☐ Praise reps who improve and move up the leaderboard.
- ☐ Recognize managers whose team performance improves from coaching.
- ☐ Evaluate how you celebrate: do you have a sales gong or gong-simulating software such as a Slack bot?
- ☐ Create incentives for quality metrics in addition to quantity metrics.

# About ExecVision

ExecVision is a conversation intelligence platform built on a simple, almost inarguable premise: Insights mined from customer interactions are exponentially more valuable when you can translate them into performance improvements in your marketing, support, sales, and product teams. We shine where other conversation intelligence software falls short: Improving performance by changing human behaviors. Founded in 2015, our team leverages all the pattern recognition and human intelligence from ExecVision's 15 years of insights-based sales coaching, and applies it to uncovering actionable insights from customer-facing conversations, allowing organizations to make better decisions, coach and develop their team at scale, drive behavior change, and ultimately generate more revenue through performance improvement. Customers like The Madison Square Garden Company, Intuit, TransUnion, Imperial Supplies, and Zuora have seen a 30+% increase in win rates and onboarding cut by at least 30%. To learn more about ExecVision, visit [www.execvision.io](http://www.execvision.io).