

## HOW TO PLAN & EXECUTE

# Management By Riding Around

### DEFINITION:

**Management by Riding Around (MBRA)** is a scheduled routine of structured field ‘work-withs,’ designed to elevate individual performance, with an explicit goal of developing the entire organization.

### PREREQUISITES:

- 1.** **Be open** about your use of this technique. Anxiety and suspicion are common. Consciously work to defuse it until acceptance (and in the case of skip-level, mimicry) is comfortably embedded in your team's DNA.
- 2.** **Plan**, just as you require your sales reps to plan their most important sales calls. You're making ‘key account’ sales calls within your own organization.
- 3.** **Fine-tune** your mix of coaching versus inspection during each ride-along. Beware of tipping the balance too far to inspection, which shuts down the learning process.
- 4.** **Leverage** MBRA to the hilt. This is a significant investment of your time; make it pay off by advancing multiple agendas on your plate.

### THE PROCESS:

To learn more, visit [www.catalyticadvisors.com](http://www.catalyticadvisors.com).

#### PREPARATION

- Do a few pilot ride-alongs. At this stage you're in "stealth mode" so schedule them in the normal course of business. In addition to honing your MBRA technique (especially, how to keep urgent emails and calls at bay), these are opportunities to test your messaging about the goals and objectives of spending structured one-on-one time in the field.
- Formally communicate the launch.
  - Use the most personal group communication medium you have at your disposal. This is an ideal topic for a face-to-face team meeting. Conference calls are not ideal (you want to read body language and map the minefield of resistance). Do not use email.
  - Provide as much detail as you're comfortable with regarding goals and objectives (forum for 2-way communication, opportunity for 1:1 coaching, etc.). Be explicit that your focus is internal, not external (i.e. "getting closer to customers" is not the primary objective).
  - Describe how you plan to inform sales reps of an upcoming ride-along. For local sales organizations, this might be an email the night before, or even walking up to them the morning of the event. Less notice is better. This minimizes choreographed ‘milk runs’, where less learning occurs.

## EXECUTION

- Iteratively develop a framework for how you execute your ride-alongs. This allows you to focus on content, not on what to do next. You're on stage, but you're performing *Hamlet*, not improv theater.
- At the start of the day, give your sales rep the opportunity to give an update on her "numbers". Especially if she doesn't have anything prepared, zero in on her performance using commonly available reports. The metrics you review will immediately get more attention within the sales force, so choose wisely.
- The ideal framework is a minimum of two sales calls in the morning ("discovery"), a break for lunch, and a minimum of two sales calls in the afternoon ("trial and refinement"). Equal time devoted to these phases reinforces coaching vs. inspection.
- Establish a rhythm of inquiry. Before each sales call, ask what the call objectives are, in addition to the background on the account. After each sales call, ask if she achieved all her call objectives. *During the sales calls, shut up.* MBRA is not about you. Your sales rep must lead, almost as if you're not there.
- The best time to provide feedback and transfer skills is at the end of lunch. Start by summarizing what you've observed, beginning with her strengths. Next, gain commitment on improving one or more key weaknesses. Identify bite-sized skills that can be digested in an afternoon, reinforcing your organization's sales training whenever you can. To accelerate your MBRA program momentum, sales reps should experience skill-building wins in each ride-along (preferably in conjunction with closing sales!).
- The afternoon is a great time to broaden your agenda. If you've kept the balance in favor of coaching, your sales rep will be open to discussions you can't have in other settings. Don't compromise the skill-building goal, but explore sensitive organizational topics and exchange ideas about growing the business. These insights can provide significant ROI on your time commitment to MBRA.
- Close the day by thanking your sales rep for including you in her workday, and for sharing her opinions on broader issues. Summarize your observations once again, this time reinforcing the progress she made on today's skill development. Assign skill development homework as appropriate. Last, ask her to send you an email within the next few days with her own summary of what she learned, as well as any "wins" that develop as a result of the sales calls you observed.

## FOLLOW UP

- Since your sales rep has the burden of summarizing her key learnings, your follow-up documentation is minimal. However, in the case of a skip-level ride-along, a download with the sales rep's manager is warranted. This, too, is a coaching opportunity, so do it with deliberate intent. For a direct report, take a moment to reflect on the trajectory of her development and file her email so you can easily retrieve it to prep her next ride-along or performance review.
- Pepper your internal conversations with key takeaways from your ride-alongs. Give public kudos for best-in-class observations.
- Fine-tune your ride-along strategy with each event. By being thoughtful about how it builds your own skills and knowledge base, MBRA can deliver a large personal ROI in addition to its business ROI.