



GUIDE

PART 4: THE RIGHT COACHING GOALS

Everything You Need to Know to Coach Like a Pro

Setting the Right Goals

There is a large difference between “Professional Friends” and predictable success.

Exactly What I Don’t Want!”

Last week I had the opportunity to catch up with a friend who has had a great sales career. We hadn’t spoken for a couple of years and he was sharing his latest sales gig with me.

When he asked me what I was up to I shared how Xvoyant has helped thousands of reps transform and that we did it without ever talking to a salesperson...we provide technology that helps a leader create 1:1s that count.

His response to me was really surprising. He said:

“That sounds like exactly the kind of thing I hope my company never buys.”

When I asked him why he told me “Our 1:1s are about getting beaten up with data. When I find a sales position a key consideration for me is how much will they let me do my thing. I don’t want any micromanagement.”

As we discussed the 1:1 impact he found that 1:1s had zero impact. He didn’t find that his leaders helped him improve or discuss things that he might do different. The conversations were around stack rankings and gaps...and not much else.

When he led his team the 1:1 was not much more than a high five.

When he wasn’t leading it was “Are you going to take 2nd place?”

He found neither particularly helpful.

The Coaching Conundrum

Recent research shows 74% of salespeople say they receive no coaching at all and only 8% say that the coaching they receive is awesome.

78% of the leaders of these same salespeople claim they are “High Performing” coaches.

Talk about a misunderstanding.

Here’s why the perspective matters. When salespeople say they are receiving great coaching, 86% of the time they hit goal.

86%.

How do you move past a perspective of being micromanaged and into a place where the 1:1 conversation creates enlightenment and inspiration?

This is one of the most important things a

leader has to get right. How do you transform results through inspiration?

Conversation Does Not Equal Commitment

A common mistake sales leaders fall into is to confuse conversations for coaching. This is best understood when considering a common mistake many salespeople make.

Most sales leaders have met the salesperson that is great at creating conversations with prospects. These salespeople make great relationships with those they contact.

Their prospects will take a call, go to an event, schedule a meeting, and say all kinds of positive things about the rep and their offering. They do just about everything except buy from the rep.

All the conversations have led to a great personal relationship, but have never translated to a profitable professional relationship. They don't create customers, they create what I call "Professional Friends."

This comes when salespeople don't help their prospects make and keep commitments. Each sales process has a different set of commitments.

A salesperson's success is largely built on their ability to create commitments with prospects that the prospect then keeps.

It starts with a commitment for time and finishes with a commitment to do business together.

Coaching is very similar.

Perception of Coaching

74%

of salespeople say they receive no coaching at all.

And Yet...

78%

of sales leaders claim that they are high performing coaches.

When salespeople say they are receiving great coaching:

84%

hit their goal.

Too many leaders confuse conversations with coaching. However, if a 1:1 conversation doesn't include a commitment, the leader isn't helping the rep intentionally improve.

Just like a rep's success comes from their ability to create commitment with prospects, a leader's success is dependent on a rep's commitment to improvement.

Making Your 1:1's Count

As emphasis in sales coaching continues to grow, there are many different definitions on what coaching really is. Tools designed to record calls, provide video practice, or manage activities all provide value in different ways.

Most "coaching" tools help prioritize areas to improve or help practice a specific skill, and they do a great job of this.

What these tools don't do is create and manage commitments to intentionally change.

Just like digital sales tools don't close business in the B2B environment, coaching tools don't drive improvement. People do.

The 1:1 meeting between leader and sales rep is something most sales organizations try to do. Unfortunately, most of the time these meetings fail to drive intentional improvement and more often are simple "check-ins."

Great reps have learned to stop counting sales calls and start making their sales calls count.

Great leaders have moved past counting their 1:1s and have learned to make the 1:1 count.

There is an anatomy to making the 1:1 count. This blueprint for 1:1 success will help you create a cadence of commitment that leads to your reps seeing your 1:1s as an important strategic meeting rather than a random meeting that they could live without.

Consistency

The first reason 1:1s fail is because leaders fail to hold them. If you are not consistent in holding 1:1s a message of their importance is sent to the team that screams louder than anything else you might say.

The frequency of your 1:1s is dependent on things like:

- **Frequency of sales activities.** In a transactional, high velocity business, you may find that the reps do so many of the sales activities every day that weekly 1:1s are valuable. In an enterprise, complex sales environment those activities may happen less frequently and as a result you may have 1:1s every 2 weeks or even monthly. Coaching is about activities. As a result, the more often a rep does key activities, the more often you should be sure to have meaningful coaching 1:1s.
- **Length of sales cycle.** A key reason to have 1:1s is to ensure short and long-term sales in predictable ways. The shorter the sales cycle, the more frequent your 1:1 cadence needs to be. Longer sales cycles can have more time in between 1:1s.
- **Trend.** There will be times when the trend is not your friend. Positive trends should not result in less frequent 1:1s. However, negative trends can create a need for more frequent 1:1s.



Four Ps—Creating Perfect 1:1 Goals

Past

What are the Drivers of Success for your sales organization? Keeping those drivers in mind, review your YTD success. You should pay particular attention to those drivers that have had the biggest effect on success over the previous period. Those are your key drivers.

What is the rep's success trajectory? A rep's status can be calculated using three points:

- Progress to Goal
- Process to Requirement
- Willingness to Change

If you know these three things about a rep, you know everything you need to know to influence the direction of their career.

Prioritize

Benchmark the performance of your team. Next, analyze your team using the following metrics:

- Opportunity Starts
- Dollars in Starts
- Win Rate
- Velocity

Understand efficiencies by examining:

- Loss Analysis
- Pipeline Health
- Sales Stages

Identify 2-3 monthly priorities that can be used as a basis for new goals. Be careful not to choose too many areas of focus. Reps respond best to 1 or 2 goals each.

Predict

With practice, the relationship between specific skills and activities with desired outcomes becomes apparent and it becomes possible for you to start predicting outcomes. You will know which skills and activities lead to which results.

Plan

Collaborate with your team members on setting and achieving goals. Your plan should be attainable and measurable. Set some larger annual or quarterly goals and then break them down into component parts to serve as your monthly goals. It is much better to move a rep to be incrementally better than to expect world-class performance from the beginning. Set specific goals and measurement plans around activities or skills to drive "next-level" performance.

Goal Types



Skill—goals centered on the learned ability to perform a task well, with focus, accuracy and talent.



Activity— goals focused on tasks necessary to move opportunities from one stage to another.



Velocity—goals based on the speed of opportunities moving through the pipeline.



Pipeline Balance— goals based on the number of opportunities in each stage and balancing the various stages to ensure a steady flow of wins.

A good rule of thumb is to not have 1:1s more frequently than weekly and no less than monthly.

Consistency is more than just the frequency. Consistency also includes the consistency of agenda. Salespeople should never be taken by surprise in a 1:1.

The agenda, data points, and accountability elements should be well-known. This allows a rep to self-assess and be prepared to have a forward-looking strategic planning session rather than a rear-looking play by play of the last couple of weeks.

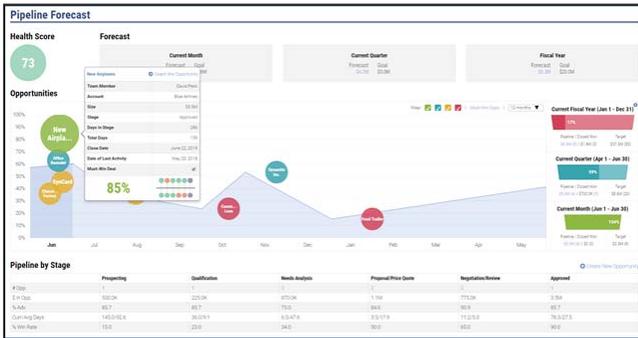
Focus Forward

At least 90% of a 1:1 should be about the future. At most only 10% of the session should be about the past. Coaching is about commitment to change. If the conversation isn't about the future, change is unlikely to happen.

There are three forward-looking topics that should be part of each 1:1. Each of them will engineer moments where the leader and rep can create commitment to change in a positive way:

- 1. Win What's Winnable:** The first item on the "What's Next" part of the 1:1 agenda is to help win deals in the existing pipeline.

The first way you can make your 1:1s meaningful to your reps is helping them win more business. Opportunity coaching is a fast way to increase win rates and improve sales cycle time.



To do this effectively, your sales process should include more than just sales stages and key sales activities.

You can measure the success of a sales activity if it created a well-defined customer verified outcome. For example, a prospecting call or email is designed to create a meeting. A demo is designed to lead to a defined next step.

Most sales organizations would benefit from adding clarity to the customer verifiers at each stage. The easiest way to help win what's winnable is to evaluate the evidence (or lack of) customer verifiers.



Verifiers at each stage help you know just how real a deal is. More important, this provides a natural way to create commitments with a rep on what they need to do in order to more predictably advance a sales stage.

In this example, this deal is critical to whether a rep will hit goal or not. The rep has it marked as "approved" and ready to close. However, when looking at the verifiers, it appears this opportunity is really still in the proposal stage because a key customer experience has been skipped.

In this 1:1, the leader and rep could set a goal to create the missing closure plan

and improve the likelihood of winning.

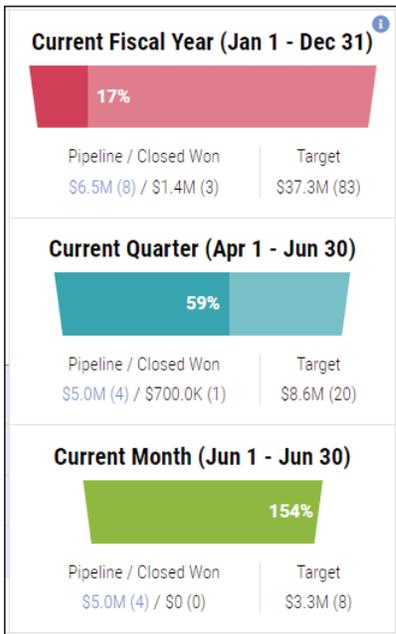
Verifiers are physical evidence that the customer has engaged in the sales process in a measurable way. Understanding these makes it very easy for your 1:1s to have powerful deal reviews.

In a recent webinar with Jim Dickie, Jim described the verifier concept as he toll required to move through a toll booth. As you come to a sales stage, the customer pays the toll with their verifier.

Only the customer can pay it. Reps can't front it for them. Either the customer schedules the next meeting or they don't. Either they provide the required data or they don't. Either they get you access to the right people or they don't.

- Achieve Pipeline Balance:** After a review of key deals in the short-term pipeline, smart leaders work to achieve balance in the middle and longer term pipelines.

The “Balance to the Pipeline” part of the 1:1 is a crucial component of a 1:1. This is the only way to avoid the rollercoaster of filling up the pipeline and then having pipeline vitality suffer while a rep is closing deals.



As I speak with sales leaders about their pipeline coverage requirements, it isn't unusual for them to have a spreadsheet showing a required coverage of something like 3-4x quota to pipeline.

The challenge with this is it is based on averages rather than being tailored for the rep. It means it is right for 1/3 of the reps, too much for 1/3 of the reps, and not enough for a final 1/3 of the reps.

To be valuable in the 1:1, calculate what the individual coverage requirement is. Help them see into the future to see where their pipeline gaps exist.

This creates a natural opportunity to set finding goals and commitments to fill up the quarterly or year end gaps if the monthly requirement is already covered.

Pipeline is life in sales. Make sure you are setting goals around short, medium, and long-term pipeline balance in every 1:1.

3. Performance Aspirations: The final piece of the forward-looking conversation is a review of the reps definition of what “Awesome” is. In part 3 of this series ([MAKE A LINK TO BOOK 3](#)) we shared a blueprint on how to connect with the rep’s definition of what awesome looks like. Use this time to use the approach described to dollarize what the aspirational performance is worth to them.

This creates a powerful opportunity to set goals around increasing opportunities, growing revenue per customer, improving win rate, and driving cycle time.

Connecting to the rep’s definition of awesome, progress in the journey, and what specific activities need to change or skills need to be developed to get there are a crucial part of engineering 1:1s your reps look forward to.

Whether you’re helping win current deals by setting goals to move through stages in predictable ways, build pipeline vitality by setting goals to fill gaps in the short, medium or long term pipeline, or achieve performance aspirations by setting goals around developing new competencies, each of these three elements will keep you focused on the future with each of your reps.

The possibilities of the future is what keeps your reps engaged.

Create “Fork in the Road” Conversations

In your 1:1s, you'll have opportunities to set goals in each of the three areas described above. The reason this agenda is so successful is you have multiple opportunities to create “Fork in the Road” conversations.

A “Fork in the Road” conversation is when you come to a point where you create a moment where the rep decides if he or she will change:

- Will you commit to the activity that creates the verifier?
- Will you commit to the activity that fills a specific pipeline gap?
- Will you commit to the activity that either drives aspirational performance or develops a skill that allows you to achieve this level?

“Fork in the Road moments are the moments where commitment happens. This is where coaching goals must be set.”

A coaching goal is a goal where a rep commits to change an activity level or develop a new skill.

Coaching goals are not dependent on a customer saying “yes.” Those are sales goals. The only person that needs to say “yes” to a coaching goal is the rep. They agree to do more of very specific sales activities. They agree to do other activities that are designed to develop specific sales skills.

The rep agrees to improve their approach to sales.

In order for this to work at scale, an organization must have a clearly defined “Skill to Success” model.

Every sales organization must define the skills and activities required to achieve success as a member of the sales team. The Skill to Success model is based on this framework:

- **Outcomes (Sales)** are driven by Sales Stages
- **Sales Stages** are a unique set of experiences each sales rep needs to engineer with prospects for them to make an informed purchase decision. Sales Stages are driven by unique, specific set of Sales Activities.
- **Activities** are high-value actions a salesperson conducts in order to help a customer engage at each stage. The success of an Activity is determined by the Sales Skills of the salesperson.
- **Sales Skills** are required for Activities to create predictable success. Each company has a unique set of skills based on the products they deliver to their market. Skills are developed with each rep through resources a company provides.
- **Resources** are what enablement teams provide to help reps create the skills and experiences that are required to be successful in the organization they represent.

The better you understand the activities, skills, and resources to move from stage to stage, the more predictable your outcomes become.

This provides a simple way to ensure 100% of coaching goals are relevant for each rep:

- **Need to move a “must win” deal to the next stage?** Set a goal to conduct a specific activity tied to a verifier.

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- **Need to build more pipeline in the quarterly pipe?** Set a goal around increasing the activities that lead to new opportunity starts.
- **Need your activities to lead to better conversion rates to reach an aspirational goal?** Set a goal around developing the skill tied to the activity in this specific compound growth driver.

This format ensures you will never have “rogue goals” where leaders ask reps to do something that doesn’t fuel the skill to success model.

This model is the fastest way to make your 1:1s relevant with every rep.

When Moments of Commitment come, set a goal that is relevant, measurable, and achievable...and that only they have to say “Yes” to.

This is the only way to move past the conversations and truly create coaching commitment.

No commitment = no change.

No change = no coaching.

It really is this simple.

Stay in the Inspiration Business

Customers don’t buy from your reps unless there is a clear reason for them to change.

The better you dollarize the reason to change the more likely the change happens.

“Reps respond to leaders who choose to be relevant to their unique journey.”

Your reps don’t buy your coaching unless there is a clear reason for them to change. Dollarizing the value of even the smallest change is the easiest way to engineer moments of commitment.

As a leader, you’re selling change. Intentional improvement requires intentional change.

Don’t beat people up with data and leave them to figure out what they need to do differently in order to win.

Too many leaders think lack of performance = lack of motivation. This simply isn’t true. I haven’t met the rep that wants to suck.

Task clarity is the fastest road to performance. Task clarity will help reps win more, fill pipeline gaps, and achieve their aspirations.

This is why gamification only works in very specific usage situations. Stop playing games with your reps and start helping them make commitments in the specific things they can change.

Quotas are set by the company. Goals are set by the rep. This is why goals are always more important than quotas.

If their goal is to hit quota then you’ve let them down. The goals should be to do very specific things that will lead them to their desired results.

“To engineer a moment of commitment with a sales rep, we must be tour guides.”

If you stay relevant and drive commitment your team will never feel micromanaged. If you lead with averages and stack rankings they will see their time with you as an “unnecessary evil.”

Remember: Transformational results require

transformational activities. Great leaders inspire transformational activities and their reps willingly give them.

Providing insight and creating moments where they commit to do something they want will keep you a strategic part of how they do what they joined your team for in the first place:

Win.

Other Guides in the World Class Sales Coaches Series

This guide is part one of a 5-part series on Sales Coaching. Don't miss the other guides in the series:

Part 1: The Right Mindset

Part 2: Using Data Like A Pro

Part 3: How to Prioritize

Part 4: Setting Effective Goals

Part 5: Following Up for Success

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