



# ESSENTIAL ELEMENTS OF A WORLD-CLASS SALES COACHING PROGRAM



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A WHITEPAPER BY THE BROOKS GROUP

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## Overview

Effective sales performance is critical when maintaining and growing a business. Sales coaching programs represent an opportunity for organizations to shape the way their sales professionals interact with clients and develop their sales skills on the job. A recent Training Industry, Inc. study shows that while close to 90 percent of organizations provide some form of coaching to their sales representatives, these programs' effectiveness varies considerably.

An understanding of the differences in sales coaching program structures across organizations is needed to provide insight into program elements that contribute to successful performance. This study investigates approaches organizations use to structure their sales coaching programs, and highlights recommended program features contributing to coaching success.

**MORE THAN 240 COMPANIES PARTICIPATED IN A TRAINING INDUSTRY, INC. STUDY ON SALES COACHING IN DECEMBER 2013. THE PURPOSE WAS TO:**

- Identify common obstacles/challenges to sales coaching success,
- Determine best practices for structuring sales coaching programs, and
- Estimate organizational investment in sales coaching programs.

Throughout this report, the approaches used by organizations with sales coaching programs that were rated effective are compared with those used by organizations that were rated ineffective. These comparisons provide a better understanding of the structural elements organizations can use to improve their own sales coaching programs, while increasing their sales professionals' effectiveness.



## Key Findings

- **65%** of organizations either did not have a sales coaching program, or had sales coaching programs that were rated **ineffective**.
- The effective group **invests almost four times** as much in their sales coaching programs.
- The most important strategies for motivating participants are **involving managers in the program and communicating manager support** of the program.
- **Simulations** and **videos** are the key delivery tools for sales coaching, which likely reflects their utility in **behavior modeling**.
- The majority of organizations using mobile learning, gamification and leaderboards in their coaching programs considered them important and useful in sales coaching.
- The best sales coaches have backgrounds in sales management, professional coaching, and/or are experienced sales representatives.
- Top sales performance is not a critical requirement for effective coaches.
- **Effective sales coaching programs are two to three times** as likely to:
  - **Effectively match** coaches with participants,
  - **Involve managers** and communicate managerial support,
  - Include online surveys, virtual environments, and mobile learning,
  - Track participant activity, and
  - **Use gamification**.

### Top 5 Best Practices:

1. Use credible coaches
2. Provide coaching in the field
3. Model correct behaviors
4. Make coaching relevant
5. Use experiential learning



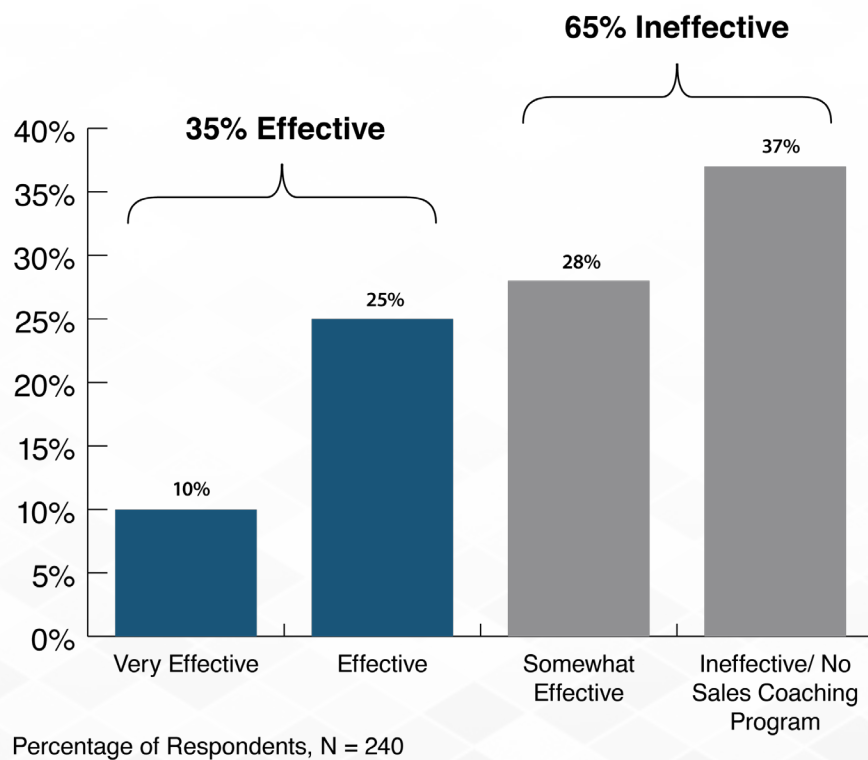
# Sales Coaching Program Characteristics

Sales coaching programs can vary by a number of characteristics. Before delving into practices that differentiate coaching programs in this study, a summary of their effectiveness, average investment, and common challenges are highlighted on pages 3–5.

## Coaching Program Effectiveness

Only 35 percent of sales coaching programs are rated *very effective* or *effective* (see Figure 1). In contrast, 65 percent of respondents rated their company's sales coaching program as *somewhat effective*, *ineffective*, or indicated that their organization did not have a sales coaching program.

FIGURE 1. RATINGS OF COACHING PROGRAM EFFECTIVENESS



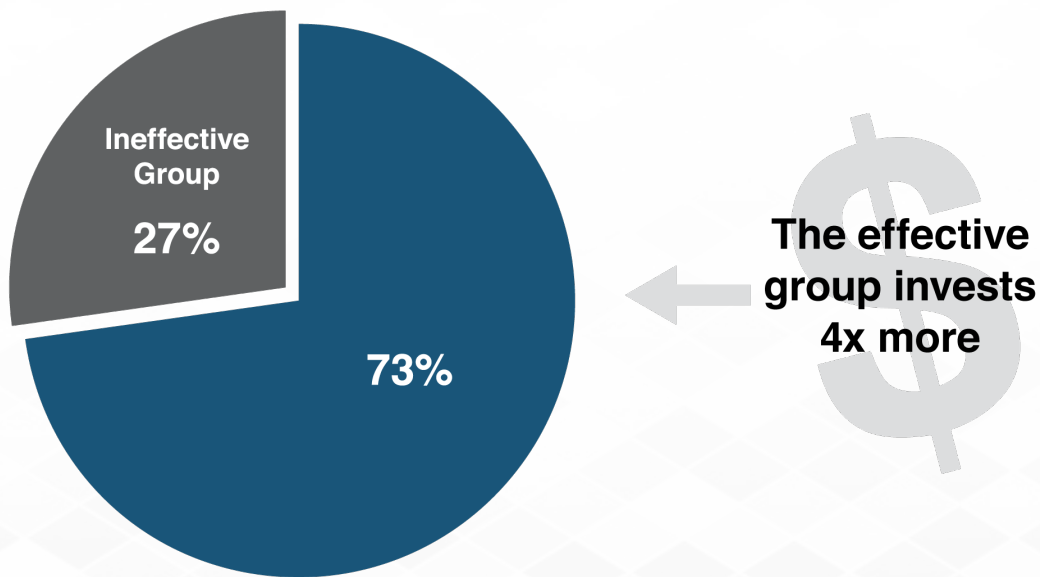
In order to identify practices that differentiate effective and ineffective programs, the effective group (i.e., organizations with sales coaching programs rated effective or very effective) is compared with the ineffective group (i.e., organizations that either do not have sales coaching programs, or have programs rated somewhat effective or ineffective) throughout this report. In doing so, the strategies for effectively structuring sales coaching programs are highlighted.

## Coaching Investment

A comparison of the effective and ineffective groups' average annual investments reveals that the effective group invests almost four times as much per person in sales coaching, than the ineffective group does (see Figure 2).

**FIGURE 2. EFFECTIVE VS. INEFFECTIVE GROUP: PER PERSON COACHING INVESTMENT**

### Annual Effective Group Investment Per Person



N = 87

## Common Challenges to Coaching Success

The three challenges most frequently experienced by sales coaching participants are: applying the learning on the job, feeling supported by managers and feeling motivated to participate (see Figure 3).

**FIGURE 3. COMMON CHALLENGES TO COACHING PROGRAM SUCCESS**



Percentage of Respondents, N = 117



# Enabling Learning

Determining the most important and effective strategies can be difficult when there is a plethora of strategies available to enable learning. The following sections provide information on the most important and frequently used strategies for enabling learning. Additionally, those that differentiate effective and ineffective coaching programs are featured.

## Strategies to Enable Learning: Importance and Actual Use

Encouraging real-world applications of learning and interaction amongst participants are the most important strategies for enabling learning in a sales coaching program. Furthermore, modeling and prompt feedback are considered important for enabling learning by more than half of the respondents. Comparing the rank ordering of importance and usage reveals that the most frequently used strategies tend to be the most important. Table 1 details the percentage of respondents rating each strategy as important and those whose organizations use each strategy.

**TABLE 1. IMPORTANCE AND USE OF STRATEGIES FOR ENABLING LEARNING**

Strategy	IMPORTANCE		USE	
	% Rating Very Important*	Rank	% Whose Organization Uses*	Rank
Encouraging real-world learning applications	70%	1	59%	2
Encouraging participant interaction	65%	2	64%	1
Having coaches model effective behavior	55%	3	45%	5
Providing prompt feedback to participants	51%	4	47%	3
Grouping information into small portions or chunks	35%	5	46%	4
Effectively matching coaches with participants	34%	6	23%	8
Repeating important topics	31%	7	44%	6
Offering opportunities for team learning (i.e., learning from peers)	30%	8	38%	7

\*Percentage of Respondents, N ranges from 157 to 193

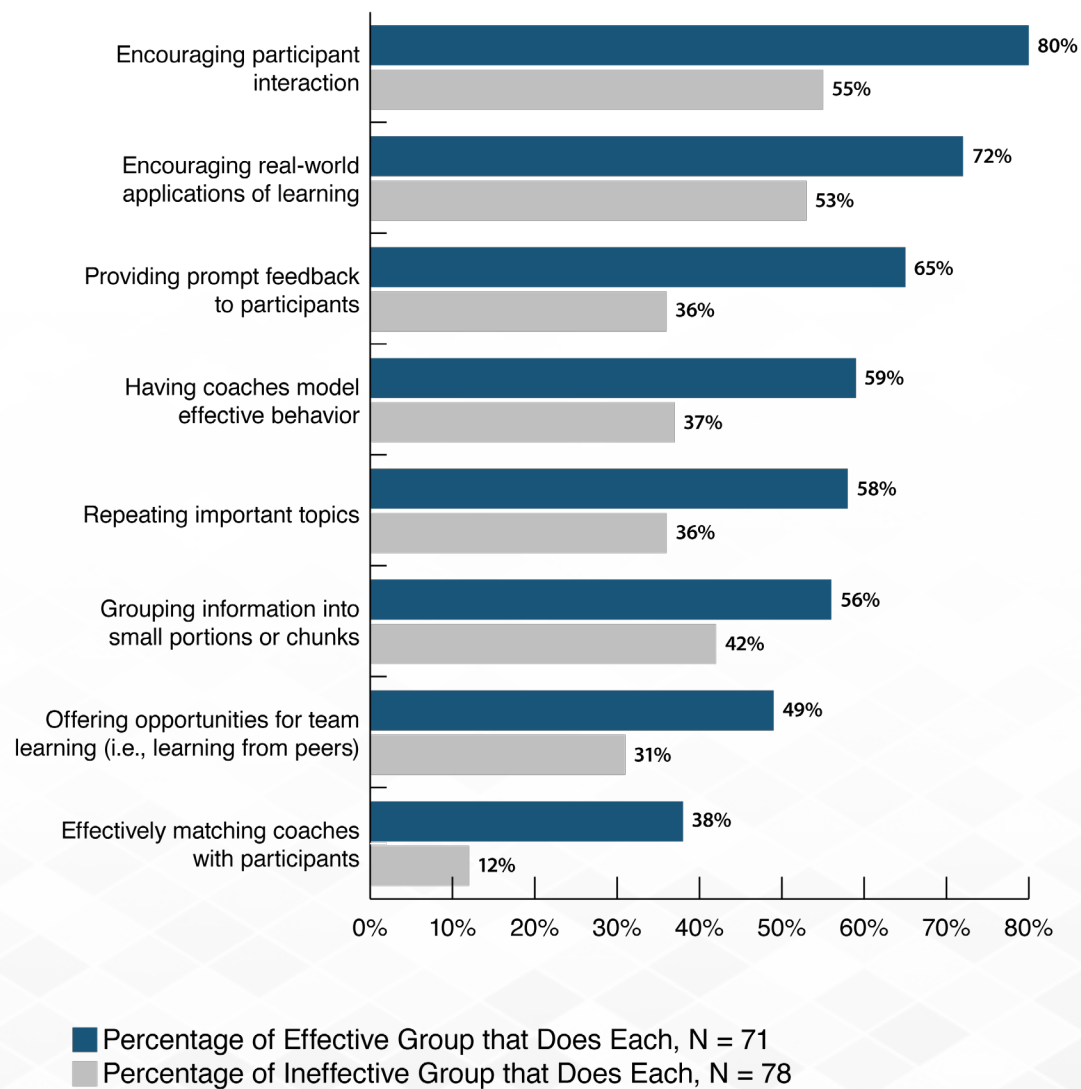




## How Effective Programs Enable Learning

A comparison of the effective and ineffective groups' use of each strategy reveals that effective sales coaching programs include all of the strategies for enabling learning more frequently (see Figure 4). Notably, **effective programs are three times more likely to effectively match coaches with participants.**

**FIGURE 4. EFFECTIVE VS. INEFFECTIVE GROUP: STRATEGIES TO ENABLING LEARNING**



## Motivating Participation

It is important to identify strategies for encouraging participation. Feeling motivated to participate was the third most frequently cited challenge experienced by sales coaching participants. The following sections provide information on strategies that can be used for this purpose.

### Strategies for Motivating Participation: Importance and Actual Use

When motivating employees to participate in sales coaching programs, the most important strategies incorporate managers and encourage them to communicate their support. Fifty percent of respondents also considered selecting coaches who participants view as experts very important. Similarly, the strategies most used by organizations were involving managers and communicating their support. Table 2 presents information on the percentage of respondents rating each strategy as very important and those whose organizations use each strategy. The rank ordering of strategies in terms of their importance and use were very similar, indicating that the most important strategies for motivating participation are also the most frequently used.

**TABLE 2. IMPORTANCE AND USE OF STRATEGIES FOR MOTIVATING PARTICIPATION**

Strategy	IMPORTANCE		USE	
	% Rating Very Important*	Rank	% Whose Organization Uses*	Rank
Involving managers in the program	55%	1	58%	1
Communicating management support of the program	55%	2	51%	2
Selecting coaches who participants view as experts	50%	3	39%	5
Tracking participant activity	33%	4	43%	3
Encouraging peer provided feedback	25%	5	42%	4
Providing rewards for participation	24%	6	33%	6
Allowing competition among participants	21%	7	25%	8
Utilizing gaming principles and mechanisms	19%	8	20%	9
Making individual activity visible to other participants	15	9	29	7

\*Percentage of Respondents, N ranges from 157 to 193



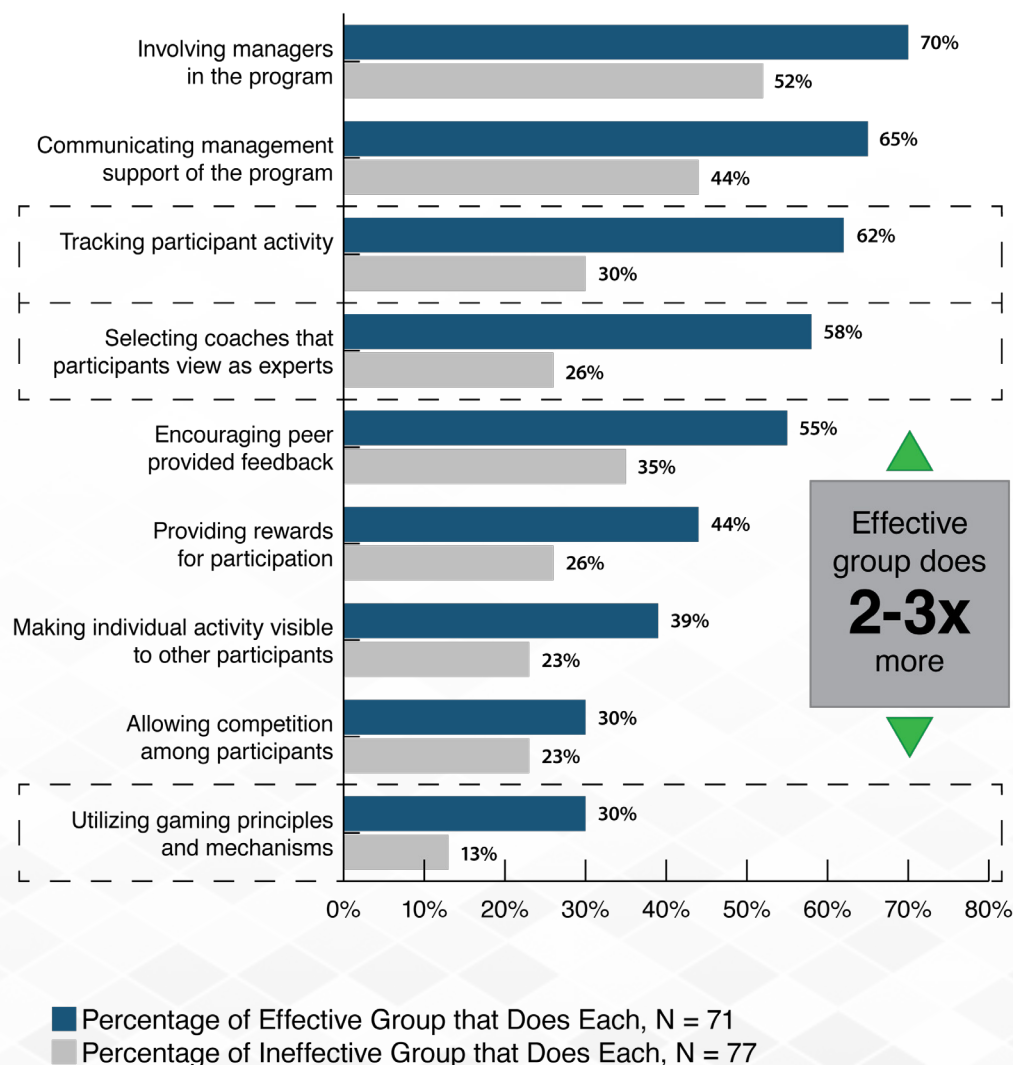
## How Effective Programs Motivate Participation

Figure 5 clearly shows that effective programs employ every strategy for motivating participation more frequently than ineffective programs. Of note is the difference between ineffective and effective groups' use of gamification to motivate participants.

**Effective programs are more than three times as likely to utilize gamification.**

Furthermore, effective programs are two times as likely to use participant activity tracking and coach selection to motivate participation.

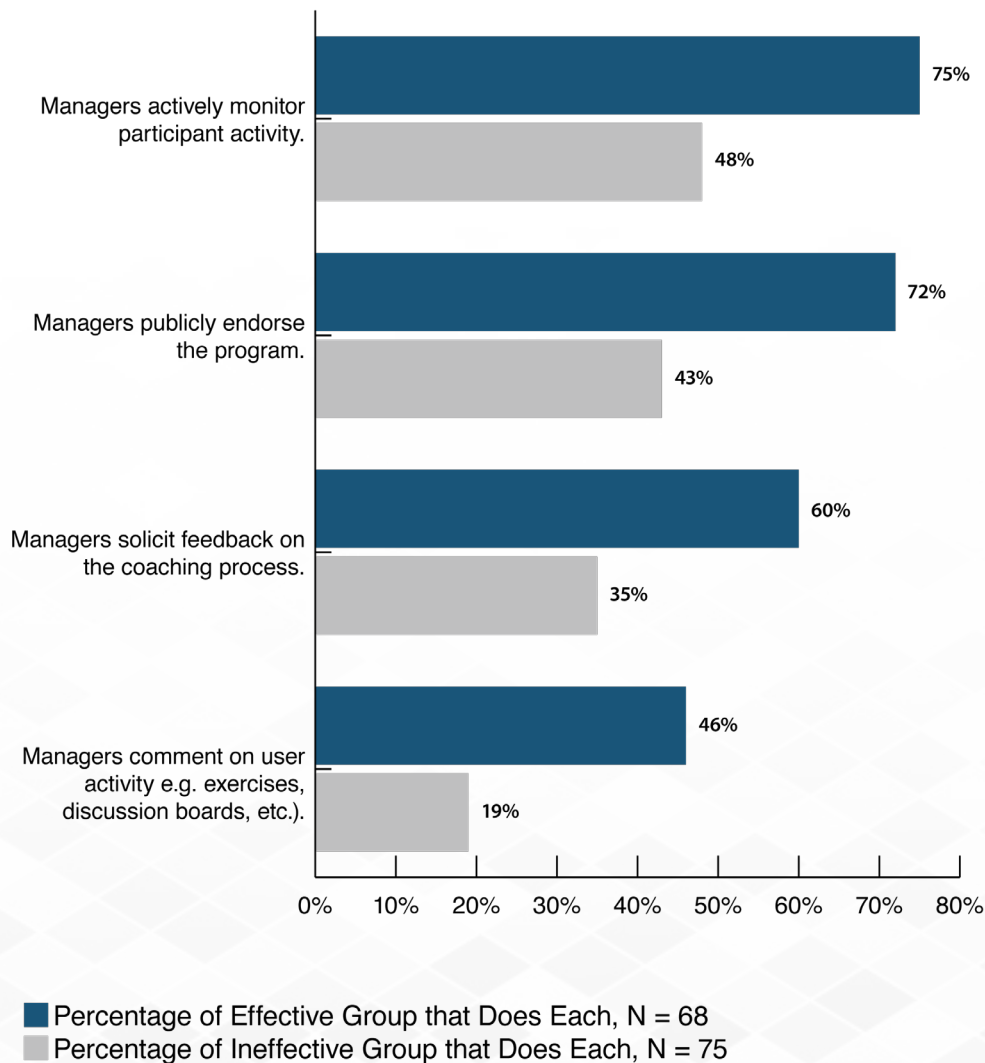
**FIGURE 5. EFFECTIVE VS. INEFFECTIVE GROUP: STRATEGIES FOR MOTIVATING PARTICIPATION**



## Involving Managers in the Sales Coaching Process

The results presented in Table 2 on Page 8 clearly demonstrate that manager involvement and support are vital to effective sales coaching programs. Moreover, as can be seen in Figure 6, **effective sales coaching programs used all strategies for involving managers more frequently** than ineffective programs, with active monitoring and public endorsement being the top strategies used.

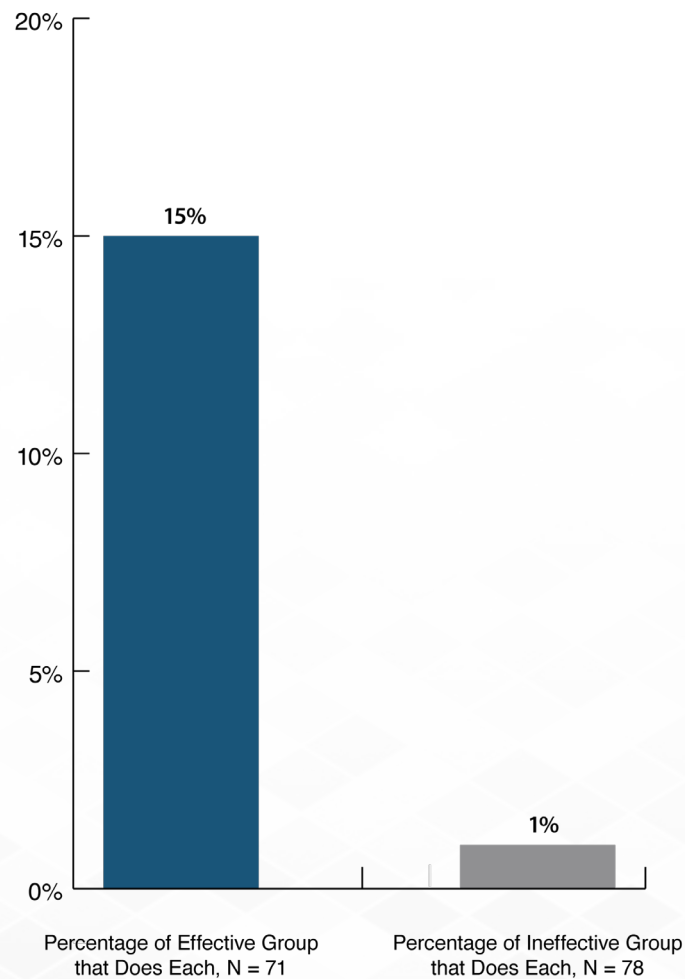
**FIGURE 6. EFFECTIVE AND INEFFECTIVE GROUPS' USE OF MANAGER INVOLVEMENT STRATEGIES**



## Gamification in Sales Coaching

Although gamification is least used and ranks last in terms of its importance to motivating participation (see Figure 5, Page 9), **sales coaching programs using gamification for this purpose are considerably more likely to be rated effective** (see Figure 7).

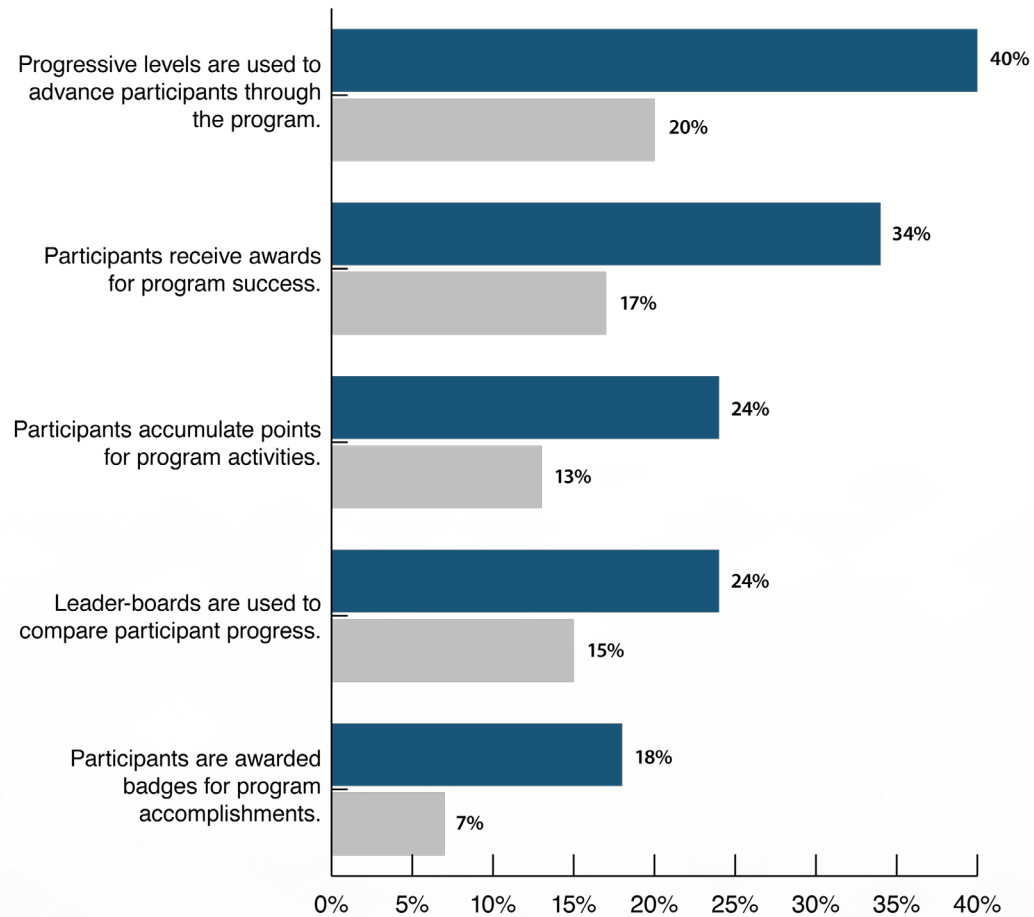
**FIGURE 7. EFFECTIVE AND INEFFECTIVE GROUPS' USE OF GAMIFICATION**



Furthermore, effective sales coaching programs include various elements of gamification more frequently than ineffective programs (see Figure 8), with the most frequently included elements being progressive levels and awards for success.



**FIGURE 8. EFFECTIVE AND INEFFECTIVE GROUPS' USE OF GAMIFICATION ELEMENTS**



■ Percentage of Effective Group that Does Each, N = 68  
■ Percentage of Ineffective Group that Does Each, N = 75

## Delivery Tools For Sales Coaching

The tools and technology used to deliver sales coaching may impact its effectiveness, as certain tools lend themselves to sales coaching delivery. The following two sections provide information about the most useful tools, those that are most frequently used, and differences in usage across effective and ineffective sales coaching programs.

### Utility and Use of Delivery Tools and Technology

Table 3 compares utility ratings and organizational use of each sales coaching delivery tool and technology. Furthermore, simulations and videos were considered the most useful tools and technology for delivering coaching. These rankings likely reflect the importance of modeling for successful coaching programs. A comparison of the utility and use rank orders reveals that the most useful tools are not always the most frequently used. While webinars are the most used tool, they rank seventh in utility. In contrast, simulations are considered the most useful tool, but are ranked fourth in terms of their actual use. These discrepancies may arise from resource and budget constraints. While webinars tend to be fairly inexpensive and easy to produce, the development of high fidelity simulations can be quite costly and time consuming.

Simulations and videos are considered the most useful tools, likely reflecting the importance of modeling in coaching programs.

**TABLE 3. UTILITY AND USE OF DELIVERY TOOLS AND TECHNOLOGY FOR SALES COACHING**

Tool/Technology	UTILITY		USE	
	% Rating Very Useful*	Rank	% Whose Organization Uses*	Rank
Simulations	84%	1	42%	4
Video	72%	2	45%	2
Knowledge repository	69%	3	43%	3
Social tools	60%	4	35%	5
Mobile learning	56%	5	25%	8
Dashboard views	56%	6	29%	6
Webinars	58%	7	49%	1
Online surveys/assessments	62%	8	28%	7
Virtual environments	54%	9	24%	9
Wiki/e-library	41%	11	14%	11
Blogs and microblogs	28%	12	18%	10

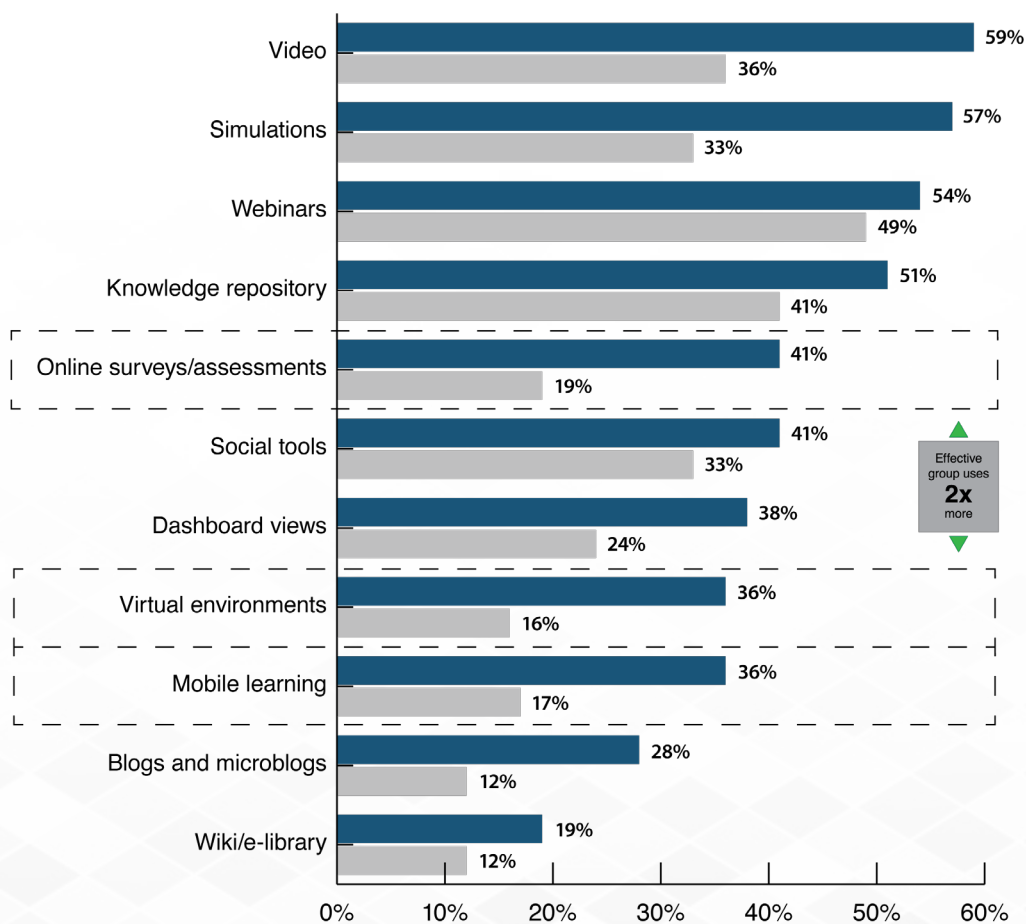
\*Percentage of Respondents, N ranges from 156 to 192



## Delivery Tools Effective Sales Coaching Programs Use

Comparing ineffective and effective programs' use of each delivery tool and technology demonstrates that effective programs use each tool more frequently than ineffective programs, with **effective programs using videos and simulations most frequently to deliver coaching** (see Figure 9). The largest differences between effective and ineffective programs occurred in their use of online surveys, virtual environments, and mobile learning — effective programs are more than twice as likely to include these tools in the delivery of their sales coaching programs.

**FIGURE 9. EFFECTIVE AND INEFFECTIVE GROUPS' USE OF TOOLS AND TECHNOLOGY**



■ Percentage of Effective Group that Does Each, N = 69  
■ Percentage of Ineffective Group that Does Each, N = 75

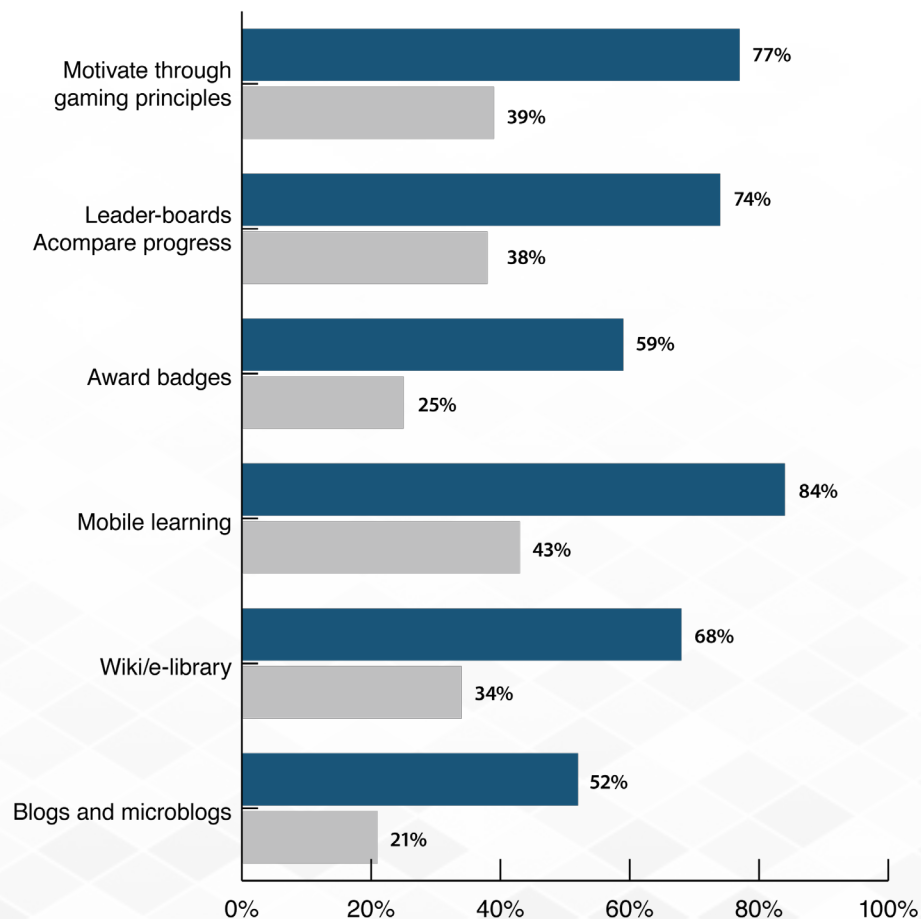


## Importance of Experience with each Element

Having experience with each sales coaching element could contribute to perceptions of their importance and utility. Elements that are infrequently used may be perceived as less important if organizations lack familiarity with and understanding of their role in sales coaching. Organizations that use seven of the elements were far more likely to rate them as important and useful in sales coaching. Although the majority of organizations did not use and did not consider these elements important, organizations that were familiar with their use in sales coaching rated them useful and important (see Figure 10).

While gamification is infrequently used, organizations that use it in sales coaching consider it important.

FIGURE 10. IMPORTANCE AND UTILITY BY USE OF SALES COACHING ELEMENTS



■ Percentage of Respondents Rating Important whose Organization Does Use, N ranges from 17 to 66

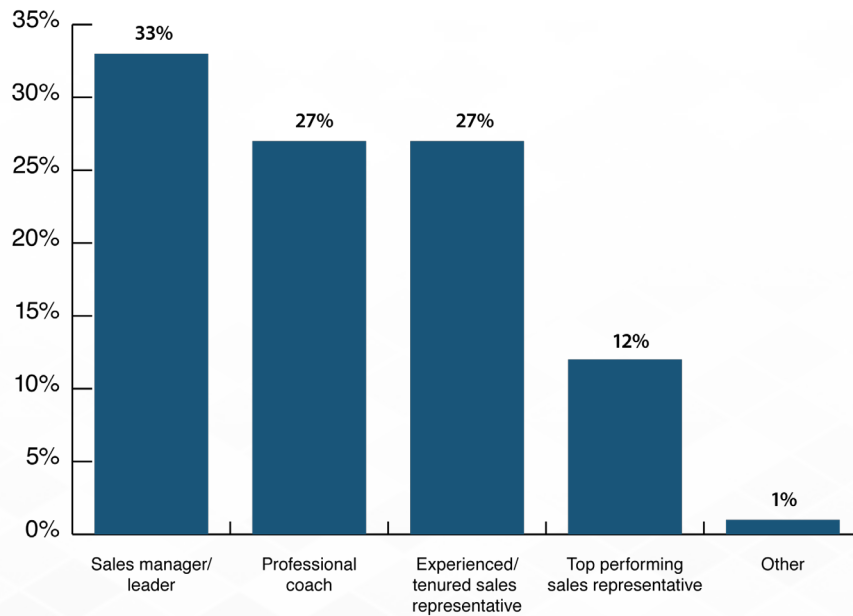
■ Percentage of Respondents Rating Important whose Organization Does Not Use, N ranges from 88 to 133



## Choosing The Best Coach

A good match between coaches and participants is key to successful sales coaching. The effective groups were three times more likely to effectively match coaches with participants as a strategy for enabling learning. Further, selecting coaches who participants view as experts was the third most important strategy for motivating participants. Interestingly, when respondents were asked about the most effective type of coach, their responses were fairly evenly divided across sales managers, professional coaches and experienced sales representatives (see Figure 11). Top sales performance does not appear to be a critical requirement for choosing coaches, as far fewer indicated that top performing sales representatives are effective coaches.

**FIGURE 11. MOST EFFECTIVE TYPES OF COACHES**



Percentage of Respondents, N = 181



# Best Practices for Delivering Coaching

Respondents suggested a variety of best practices for delivering sales coaching (N = 196 comments), including

- Using credible coaches (i.e., experienced professionals),
- Providing coaching in the field,
- Modeling correct behaviors,
- Making coaching relevant and applicable,
- Using experiential learning techniques, including role plays and simulations,
- Making coaching interactive (e.g., two-way conversation),
- Providing coaching on an on-going basis,
- Structuring coaching to ensure consistent, frequent, and regular meetings,
- Including face-to-face meetings with virtual reinforcement, and
- Holding one-on-one meetings and supplement with group meetings for peer experience sharing.

Using credible coaches topped the list, suggesting that care should be taken in choosing coaches for sales coaching programs. Providing coaching on the job was second most frequently cited. Respondents stressed the importance of offering coaching in the context of real job experiences, providing timely guidance during sales engagements. Modeling correct behaviors was also frequently cited, with comments suggesting that modeling is pivotal to learning and development in coaching programs.



## Conclusion

With only 35% of respondents rating their organization's sales coaching program effective, it is clear that many organizations can benefit from improved sales coaching practices, including practices that enable learning, motivate participation and effectively deliver coaching.

### Enabling Learning:

- **The top challenge to participant success was applying learning on the job.**
- **The most important strategies for enabling learning, in order of importance, were:**
  - Encouraging real-world applications of learning,
  - Encouraging participant interaction,
  - Having coaches model effective behavior, and
  - Providing prompt feedback.
- **Best practice recommendations include:**
  - Provide coaching in the field, and
  - Make coaching relevant.

### Motivating Participation:

- **The second and third biggest challenges to participant success were feeling supported by managers and feeling motivated to participate.**
- **Involving managers in, and communicating their support of sales coaching programs were the top strategies for motivating participation.**
- **Effective sales coaching programs used strategies for involving managers more frequently than did ineffective programs.**
  - Having managers actively monitor participant activity was most frequently used.
  - Having managers publicly endorse the program was second in use.
- **Gamification is likely to increase sales coaching effectiveness.**
  - The effective group used it three times more often than the ineffective group.
  - The majority of those whose organizations used gamification to motivate participation considered it important.



## Delivery Tools:

- **Organizations consider a variety of tools for delivering sales coaching, balancing both utility and costs.**
  - Webinars, a lower cost option, were the most frequently used, while
  - Simulations, a higher cost option, were rated most useful.
- **Tools that allow behavior modeling are critical for effective coaching programs.**
  - Effective coaching programs used videos and simulations more frequently, reflecting their emphasis on behavior modeling.
  - Having coaches model effective behavior ranked third in importance for enabling learning.
  - Behavior modeling was one of the top three best practices cited by respondents.



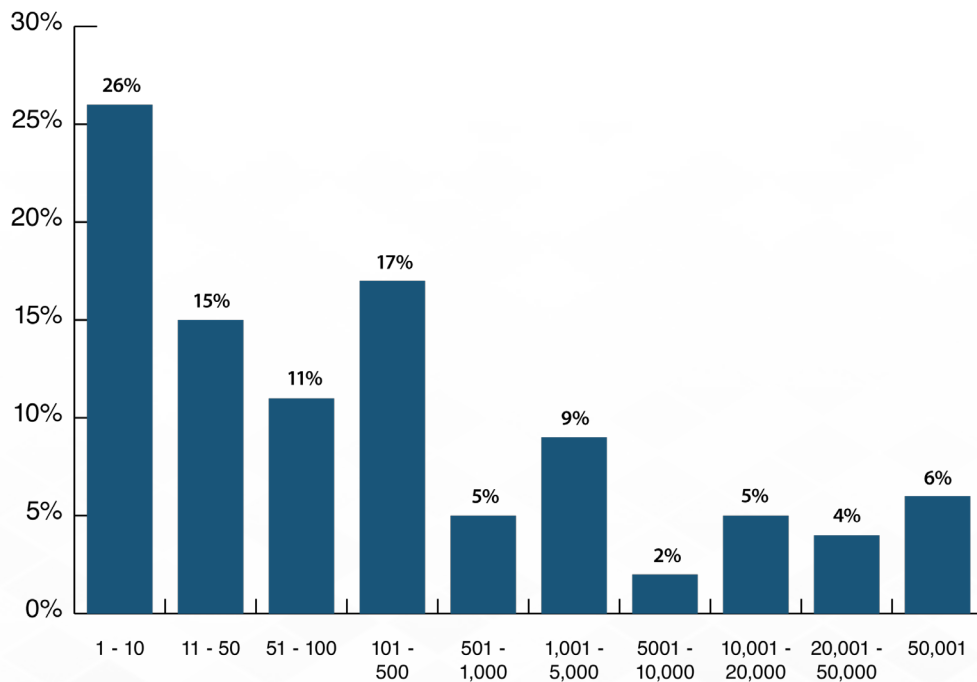
## Demographics

The following section provides information about respondents' demographic characteristics.

### Company Size

Forty-eight percent of respondents came from organizations with 100 or more employees (see Figure 12).

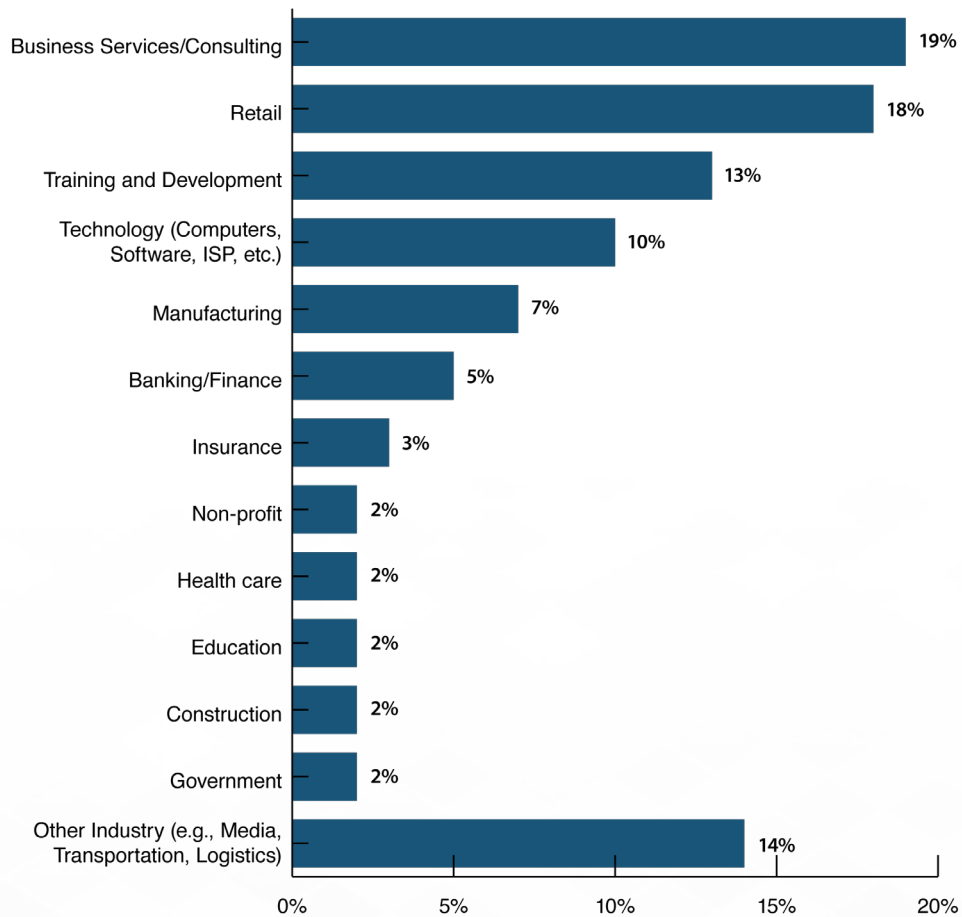
**FIGURE 12. RESPONDENTS' COMPANY SIZE**



Percentage of Respondents, N = 175

## Industries Represented

FIGURE 13. RESPONDENT'S INDUSTRY



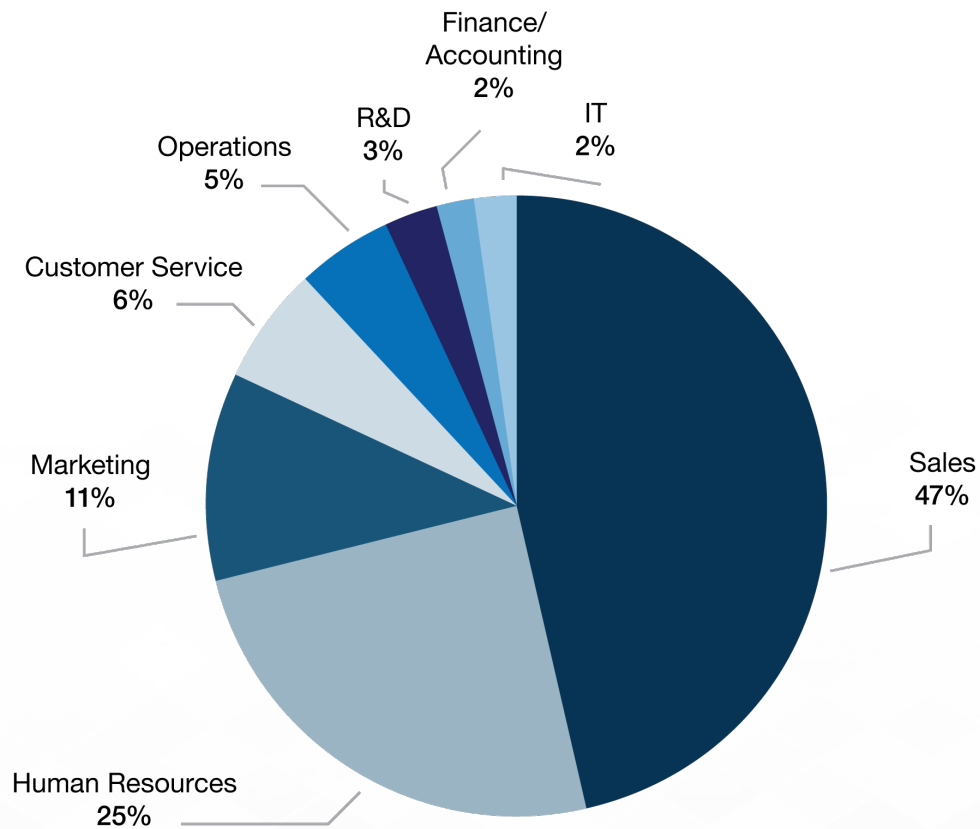
Percentage of Respondents, N = 175



## Departments

The majority of respondents represented Sales and Human Resource departments (see Figure 14).

**FIGURE 14. RESPONDENTS' DEPARTMENT**



Percentage of Respondents, N = 175

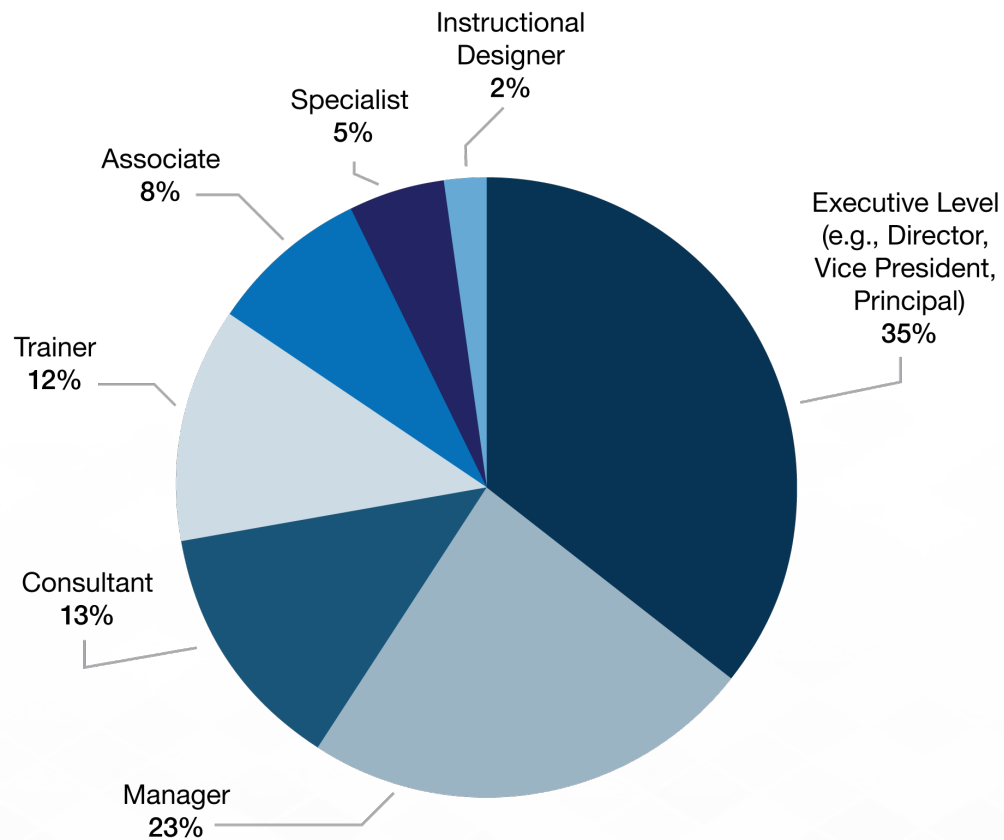




## Job Roles

The majority of respondents held leadership roles (see Figure 15).

**FIGURE 15. RESPONDENTS' JOB ROLES**



Percentage of Respondents, N = 175

# About this Research

## About The Brooks Group

With nearly 40 years of industry experience, The Brooks Group achieves sustainable sales culture transformation for clients by delivering targeted training that becomes operationalized by threading into an organization's existing systems.

The Brooks Group takes a holistic approach to practical culture shifts and focuses on customized "street smart" sales and sales management programs, with a high level of relevance and practicality for the individual learner. Training gets reinforced with an industry-leading cloud-based sales and sales management coaching platform.

The Brooks Group's clients get the best available resources for screening, training, developing and retaining sales and sales management talent customized specifically to their organization's needs. Our programs include:

- Customized IMPACT Sales Training
- Customized Sales Management Training
- Inside Sales Training
- Negotiation Skills Training
- Senior Level Decision Maker Selling Training
- Prospecting Skills Development
- Presentation Skills Training
- Channel Sales Training
- Sales Assessments for Hiring and Development

*\* All of our training programs include best-in-class reinforcement.*

## Our results:

- 94 percent of The Brooks Group's training participants win new accounts as a result of the training
- 99 percent see increased sales volume
- 86 percent see an increase in their conversion rate
- 75 percent say they're better at building trust and rapport and are more confident in approaching prospects
- 57 percent report rarely reducing their selling price

## For more information

The Brooks Group can be reached by phone at (800) 633-7762, by email at [Contact@TheBrooksGroup.com](mailto:Contact@TheBrooksGroup.com) or online at [TheBrooksGroup.com](http://TheBrooksGroup.com).



## About Training Industry

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## About This Research

Training Industry Research captures the collective wisdom of learning professionals, revealing fresh data on trends and practices in the evolving training market.

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