

CoE Webcast Series



Creating a Coaching Culture

Host



Alex Symos

VP, Sales & Marketing Centers of Excellence



Guest Speaker

The logo for EXECVISION features the word "EXECVISION" in a bold, orange, sans-serif font. Above the letter "V" are three curved, orange lines that resemble a signal or Wi-Fi icon.

Steve Richard

Chief Revenue Officer





ExecVision Coaching Academy

Please Be Fully Present





**KEEP
CALM
AND
TRAIN
MANAGERS**

MANDATE:

Grow Pipeline & Revenue

HOW?

1. Consistent training & faster onboarding
2. Consistent management coaching
3. Consistent adherence to the process
4. Culture of accountability

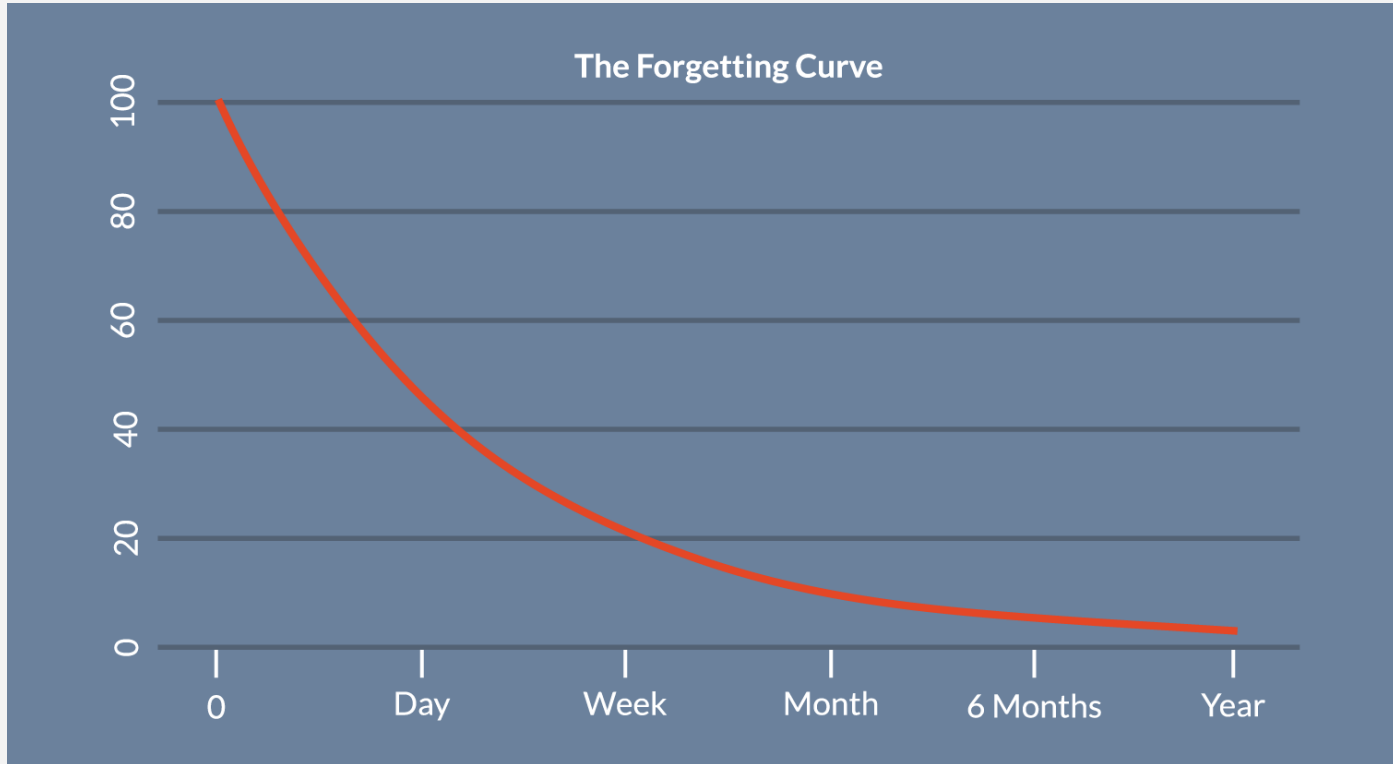
Training
≠
Coaching

The Reality

Most Sales Managers do not have a coaching plan, are ill prepared for coaching opportunities, have no way to observe coachable moments, and do not coach their reps in a way that encourages them to self-correct.

Sales Managers mean to coach,
but something always gets in the way...

OUR ENEMY: The Forgetting Curve



Repetition & Sleep



The Neuroscience of Mastery



Initial Understanding

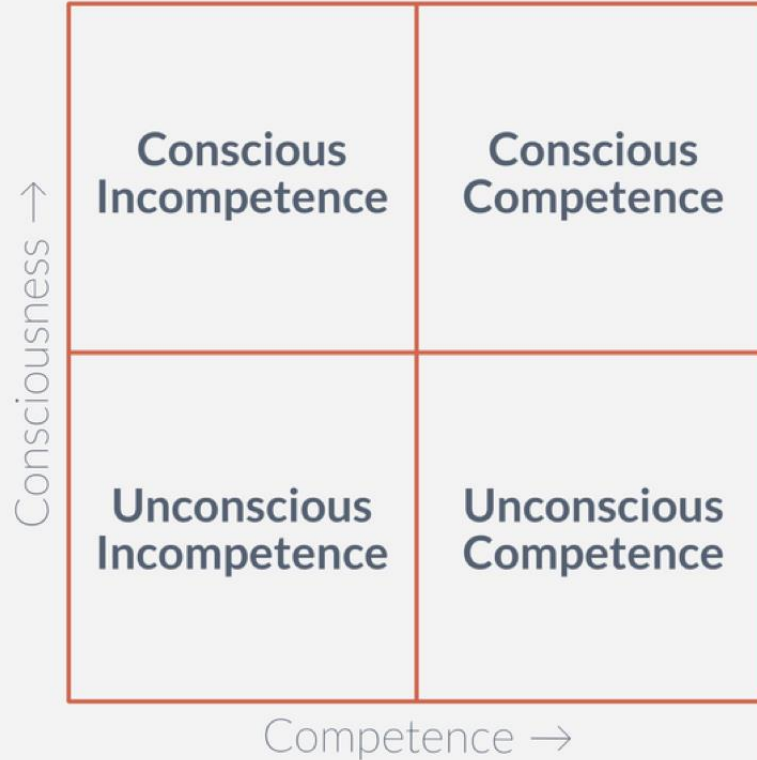


Growing Neural Connections



Mastery

Human Behavior Change



**Who Decides if the Rep
Changes Their Behavior?**

What Happens When You Lead with Criticism?

Trust is the Foundation

Positive & Productive Culture

Benefits of Sales Coaching

Great sales coaching, done well, and done consistently, can deliver on three primary benefits.

1

Create More Top Performers

Studies prove that when B- and C-grade sales reps are coached consistently, companies can expect a 17% or greater improvement in productivity.¹

2

Build a Culture of Transparency & Collaboration

Coaching that utilizes call recordings gives managers and reps clear visibility into performance. Pairing new and tenured reps demystifies the “secret sauce” of top performers.

3

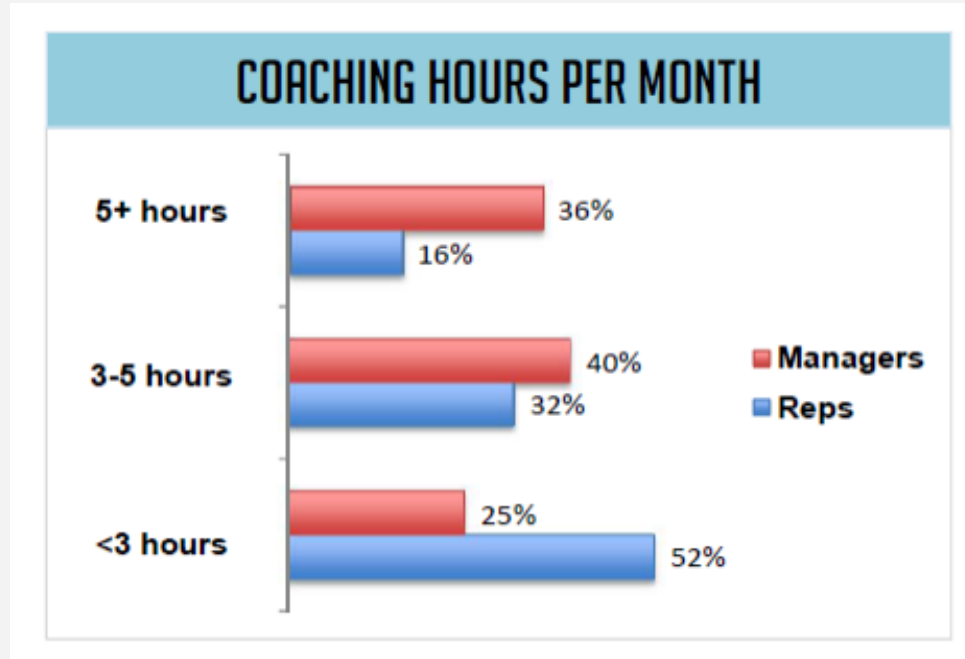
Attract and Retain Top Talent

Consistent coaching increases quota attainment for “core” performers, reducing the burden on stars. Plus, today’s workforce is hungry for frequent, “bite-sized” feedback.²

1. HBR: *The Dirty Secret of Sales Coaching*

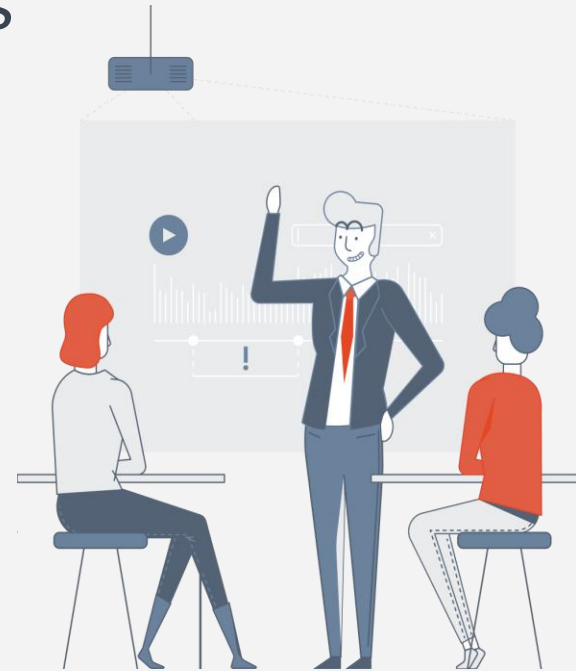
2. Bridge Group: *Mythbusting Millennials*

But There's Perception Gap



Group Exercise

1. What are your biggest challenges for having a sales coaching culture?
2. What's tough about coaching?



Objectives

You will learn how to:

1. Set organizational prerequisites
2. Gain alignment on goals
3. Define what 'good' looks like
4. Coach calls the right way
5. Determine who to coach & how much
6. Create fun coaching plans that people like
7. Track to hold people accountable

Prerequisite: Will to Act

To get the most out of sales coaching, there are three vital requirements.

A

Is there management buy-in on the value of coaching for sales improvement?

B

Do you have 'observable moments' aka accessible and shareable recordings?

C

Does your organization have a culture of trust, collaboration, and accountability?

Gain Alignment

Align your
management team
on **why you are
coaching.**

Understand and document the specific goals – qualitative or quantitative – that coaching will drive.

Reduce ramp time from X to Y months

Increase conversion rates from X to Y.

Grow revenue per rep by XX%

Define what good looks like

Do you know what a good call sounds like for your company?

Put it to paper!

Calls at different stages of the sales process have different blueprints. When you document the important elements of each call type, reps get a game plan. Blueprints can be turned into coaching scorecards.

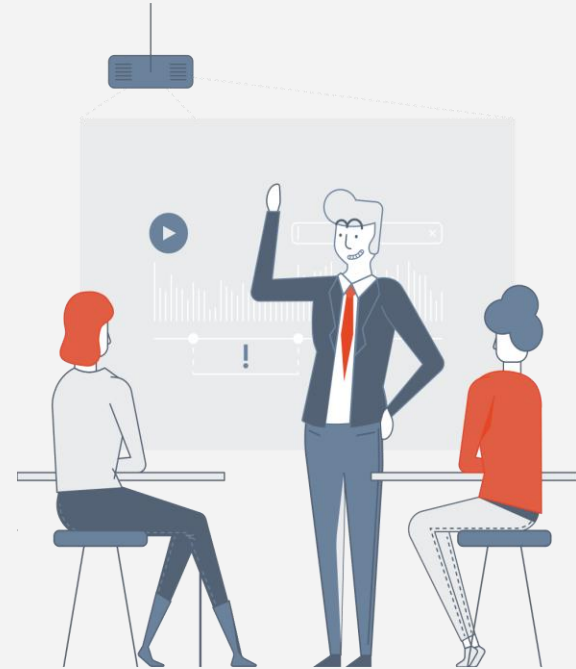
Scorecards must be objective and specific. Base them on key elements you hear in conversations.

Pair Exercise

Discuss your 'why' behind a coaching program.

- Why bother coaching at all?
- What quantitative metrics can you inspect to know the coaching program is worth the effort?
- How will you define success qualitatively?

Everyone needs to be aligned on your definition of success.



What are the easiest behavior changes that have the biggest impact on revenue?

(E21)

'Good' Key Behaviors

1

Call Opening

Does the rep open the call with a clear purpose?

2

Questions

Does the rep engage the buyer with questions about their needs?

3

Next Steps

Does the rep summarize the concrete mutual plan of action?

4

???

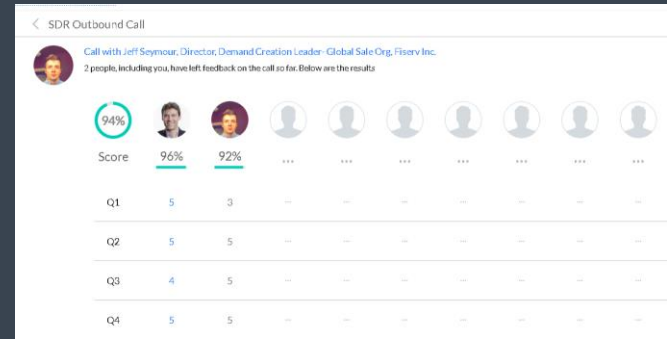
???

How ExecVision Helps



Can you define what good looks like and calibrate

Questions:		No		Maybe		Yes
1. Was there a lead-in?	N/A	1	2	3	4	5
2. Was a direction for the call established?	N/A	1	2	3	4	5
3. Did the prospect engage in the conversation?	N/A	1	2	3	4	5
4. Was it clear why the prospect did/didn't take the meeting?	N/A	1	2	3	4	5
5. Were there firm next steps following the call?	N/A	1	2	3	4	5





Team Exercise

What are the 'key elements' for your different call types? Pick 3-7 elements only. Each behavior should be worded:

Does the rep...?

What are the fewest and easiest behavior changes that will have the biggest impact on your definition of success?

Skills Heatmap

STRENGTHS AND WEAKNESSES BY REP

 Parameters

4 Weeks 

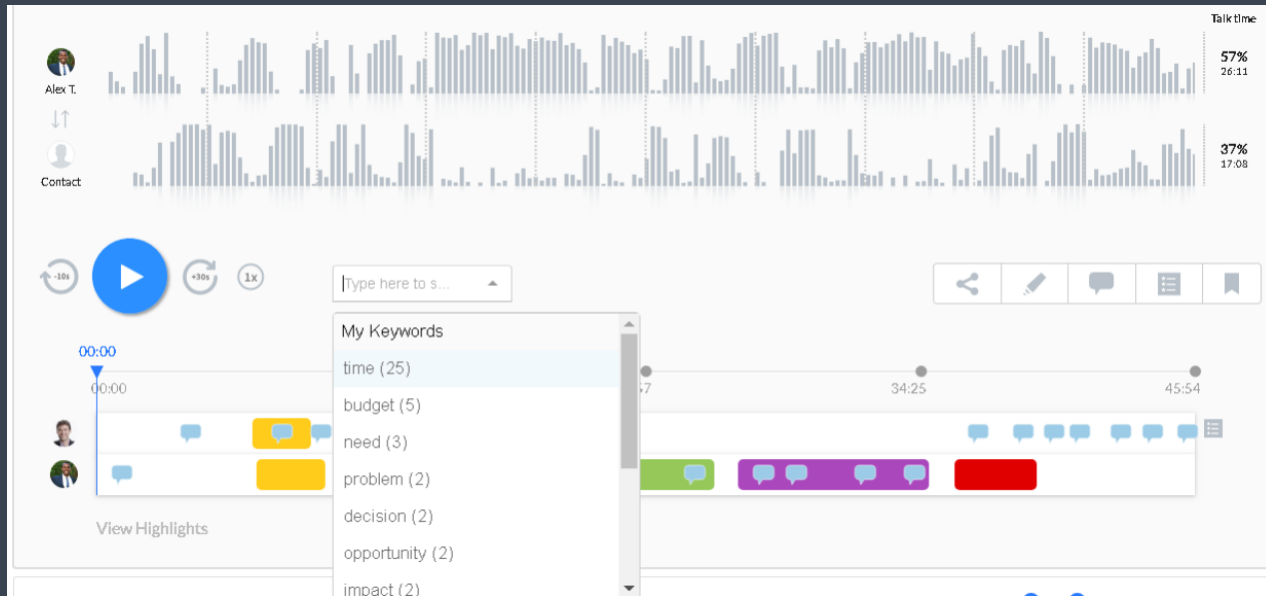
REP	COMMON CHALLENGE	CONVERSATL... SKILLS	DIFFERENTIA...	LEAD IN	NEXT STEPS	OBJECTION HANDLING	PRE-CALL RESEARCH	AVERAGE SCORE	BASED ON # OF SCORECARDS
Knika P.	4	4	3	4	3	3	4	3	14
Tyler B.	4	4	2	4	3	3	4	3	11
Rich M.	4	3	2	5	2	3	4	3	11
Team Average	4	4	3	4	3	3	4	3	36

Words are the 'Markers'
of Great Conversations

How ExecVision Helps



Do you know the vocabulary of top performers?





Team Exercise

Let's figure out keywords with a high impact on positive outcomes.

1. What do you hear reps say that make you cringe?
2. What do top reps say that is different than average reps?

→ Topics should be aligned with the key behaviors we outlined in the previous exercise

Trust is the Foundation

The Elements of Trust–The 5 ‘C’s

1 Core Values

2 Comp Plan

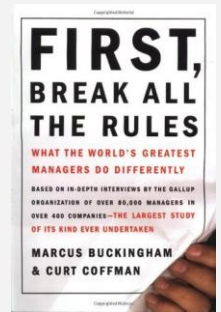
3 Career Path

4 Conflict Avoidance

5 Culture

Positive, Productive Culture

1. Do I know what is expected of me at work?
2. Do I have the materials and equipment I need to do my work right?
3. At work do I have the opportunity to do what I do best every day?
4. In the last seven days have I received recognition or praise for doing good work?
5. Does my supervisor or someone at work seem to care about me as a person?
6. Is there someone at work who encourages my development?
7. At work do my opinions seem to count?
8. Does the mission/purpose of my company make me feel my job is important?
9. Are my coworkers committed to doing quality work?
10. Do I have a best friend at work?
11. In the last six months has someone talked to me about my progress?
12. This last year have I had opportunities to learn and grow?



How ExecVision Helps



Does your organization have a culture of trust, collaboration, and accountability?

Some proven approaches

Monthly Call Contests

Have reps score and share their best calls on a regular basis. Play winning calls in front of the everyone. Award prizes.

Library of All-Star Calls

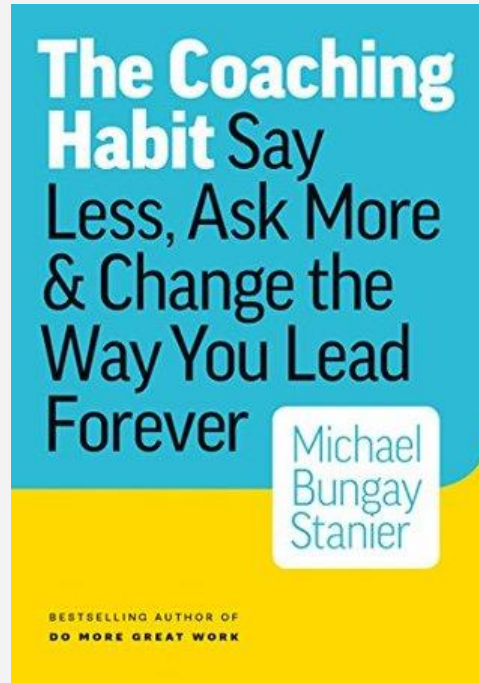
Build a library of the best calls organized by skills (like call opening, value proposition, great questions, objection handling, and closing for next steps).

Peer-to-Peer

Pair junior-level reps with veterans with the idea that they will listen to at least 2-3 of the vet calls/week. Junior reps share calls with veteran reps for coaching.

Consistency is key: However you foster your coaching culture, make it a habit.

Coaching IS Asking Questions



Keenan's Coaching Model

Observe

Describe

Prescribe



**Expert
Tip**

Frequently people can't see what they are doing that impacts performance. Do not judge. Instead observe and describe.

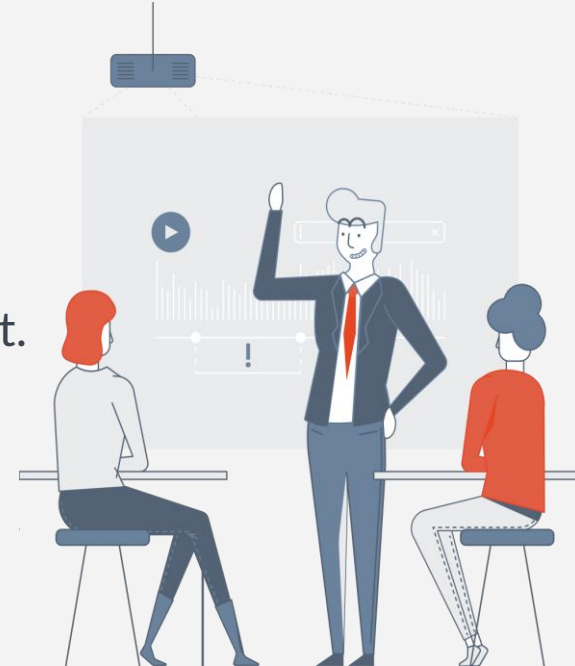




Individual Exercise

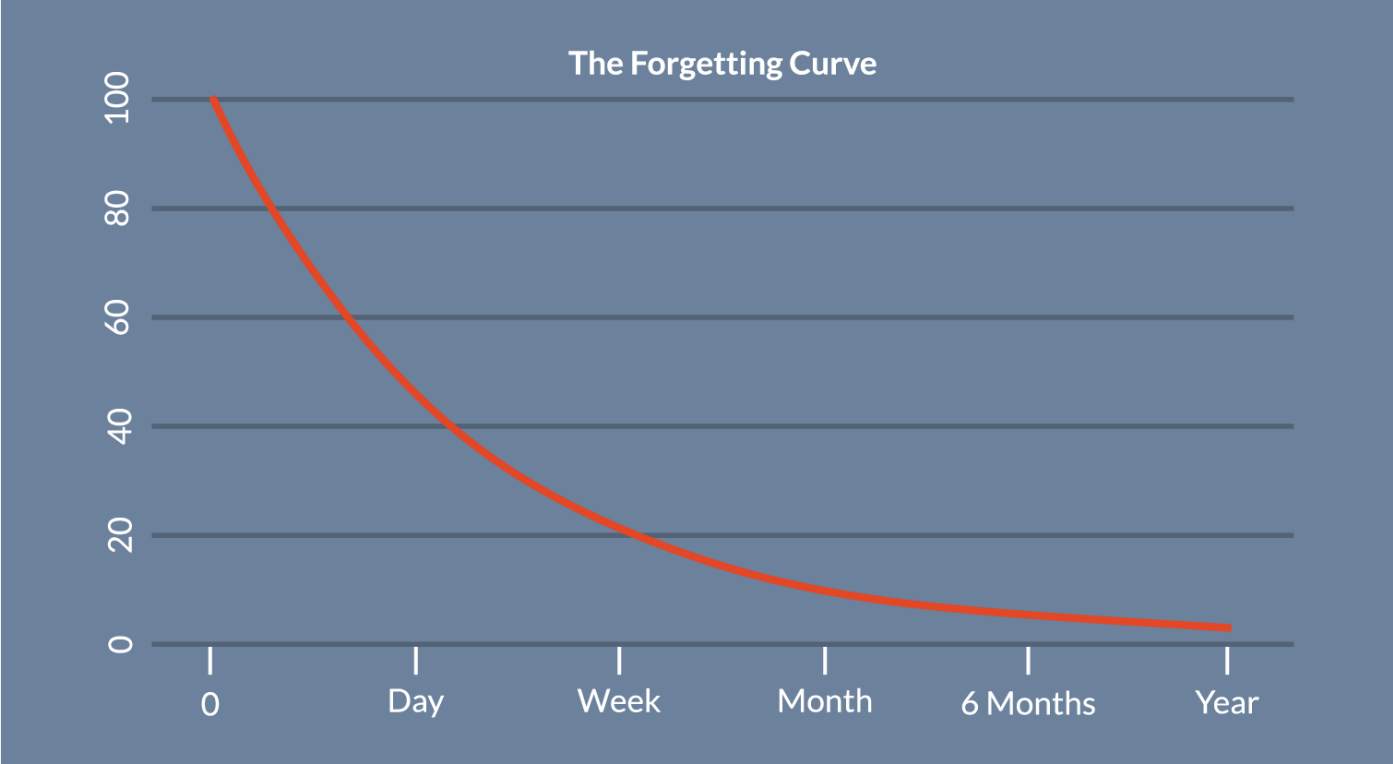
Find a coachable moment in ExecVision.

1. **Observe** what's happening and suspend judgement.
2. **Describe** what you observe as comments on the call.
3. **Prescribe** by asking the rep a question in the comment.



**Changing Adult Behavior
Requires Specific
Know How**

The Forgetting Curve



Coach Calls the Right Way

Know how to do synchronous and asynchronous coaching the right way.

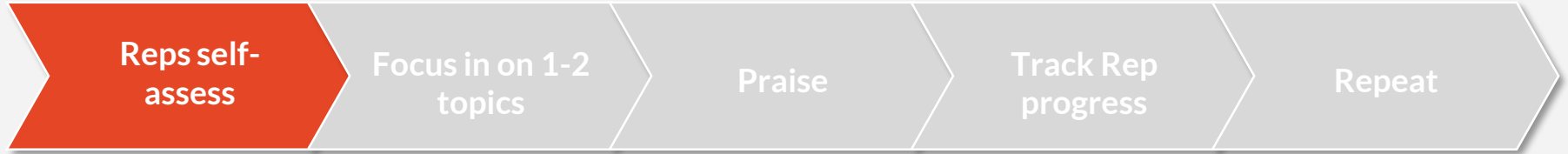
ExecVision Recommendation:



Positive & Productive

What Happens When You
Lead with Criticism?

Coach Calls the Right Way



Each week reps identify two of their own calls—one where they struggled and one they think went well.

Expert Tip

Have reps annotate their own calls to pinpoint coaching opportunities before sharing with their managers. Self-reflection and self-discovery, even for 10 minutes a week, makes an enormous difference.

When reps identify their own problems, it speeds up the coaching process. Managers coach those who first try to coach themselves..

The Power of Self-Assessment

You can't argue with
your own ears.



Kim Harrington
Director, Client Development
Belfort Furniture

**Reps Frequently Self-identify
Where They Need Coaching**

**What Happens When You
Coach the Rep on Five
Different Things?**

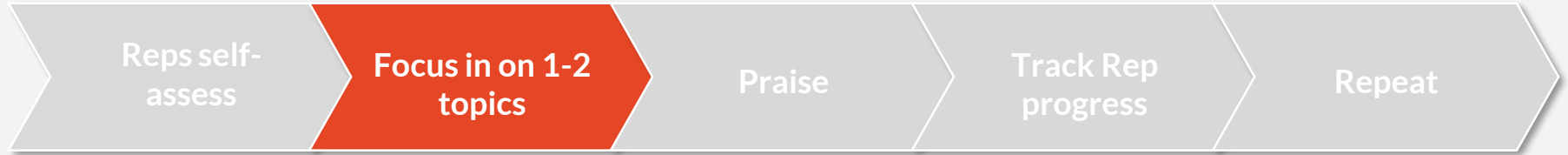
Too Much Coaching



Bob Perkins
Chairman
American Association of Inside
Sales Professions

We coach way too much. Focus on one thing at a time.

Coach Calls the Right Way



Too much coaching at once makes it hard to know where to start.

Expert Tip

Identify 1 or 2 skills your rep needs the most work on. She'll be able to focus on developing those skills. Once she's mastered those two skills, identify the next skills that need improvement. Ask questions!
"Observe, Describe, Prescribe" – Keenan, 'A Sales Guy'

BONUS Tip!

If you have a library of recordings that exemplify specific skills or elements, direct your rep to the set they need to review to improve.

Coach Calls the Right Way



Positive reinforcement can have a big impact. Levels on Dopamine (good feelings) in the brain increase and Cortisol (stress) decreases.

Expert Tip

Deliver specific praise in an all-hands sales meeting. Make it known that hard work is appreciated - their grind isn't going unnoticed!

If a rep is focusing on a particular skill - like getting a buyer to take action - and used that skill to close a deal, praise the rep.

Praise is Free

1

Specific

What specifically did the rep do that was good?

2

Less Frequent

Daily high-fives are good; quarterly recognition has more impact.

3

Public

Recognition in front of a larger group of peers is memorable.

4

Delivered by a Senior Leader

When your boss' boss praises you, it leaves a lasting impression

How ExecVision Helps



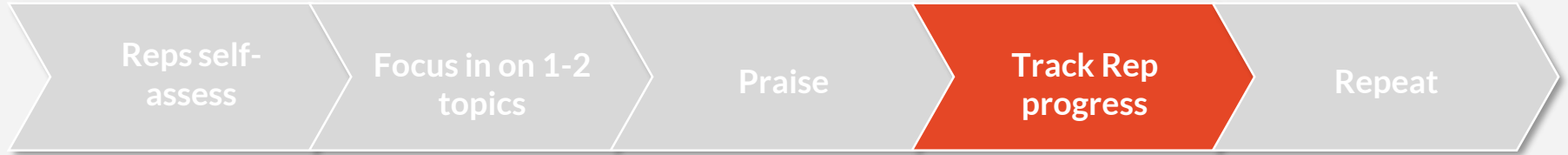
How can you praise using ExecVision?

The screenshot displays the ExecVision interface. At the top, the logo "EXECVISION" is on the left, and navigation tabs "CALLS", "LIBRARY", and "ADMIN" are in the center. A user profile for "Steve Richard" is on the right. Below the navigation, the page is titled "Vorsight Library > Search Calls" and "Library: Call of the Month".

The main content area shows a call entry for "Javi Badillo" with a star icon and "Feedback Provided". The call title is "Call with Manthan Bhatt, State Government Affairs Manager, A..." and it took place on "Jan 31st at 07:25PM for 14:43 minutes". The conversation topic is "Convo: Meeting Scheduled | Phone2Action".

Below the call details is a play button and a search box labeled "Topic / Keywords". To the right are icons for chat, edit, notes, like, and share. A "Talk time" chart shows two bars: one for "Javi B." at 43% (06:23) and one for "Contact" at 55% (08:10). A transcript is visible at the bottom, with a highlighted segment at 11:08 by Steve Richard: "I'll take the meeting because I like you? That's great!! The way you smoothly suggest a time is all art form and perfectly done. Get greedy and go for in person."

Coach Calls the Right Way



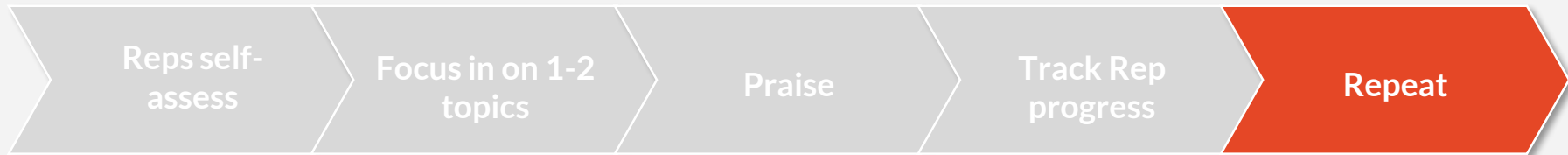
When coaching a rep's call, use a scorecard with consistent criteria.

Assign a numerical value based on what they did and didn't do during the call. Over time, you can track any one rep's progression based on their scores on the same grader.

Expert Tip

Track the average of your team's scores – and the progression over time – to identify how long it takes to fully ramp a new rep. Scores can be used in annual performance reviews, one-on-ones, even as insight into why a specific quarter did well – or not so well.

Coach Calls the Right Way



A coaching process must be consistently repeated to see true improvement. Otherwise, requests taper off and rep improvement suffers. **But repetition must be scalable.**

Have your reps provide feedback on two calls per week and share it with you. You can then coach the calls in a fraction of the time.

Traditional Coaching: *Managerial Strain*

1. Rep sends recording to manager.
2. Manager reviews entire call.
3. Manager preps coaching notes.
4. Manager delivers feedback.

Average Manager time requirement:
75-90 minutes / rep / week

Recommended Approach: *Rep Accountability*

1. Rep annotates call & shares w/ manager.
2. Manager reviews key moments, comments, and scores asynchronously
3. Manager and rep discuss synchronously.

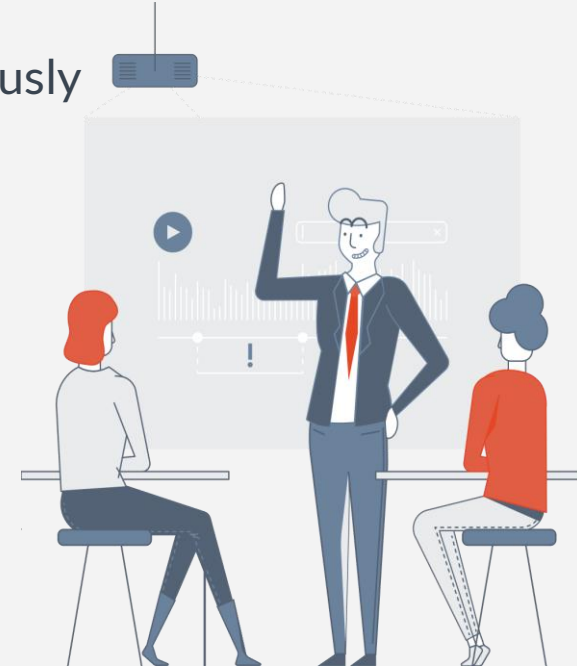
Average Manager time requirement:
15 minutes / rep / week



Pair Exercise

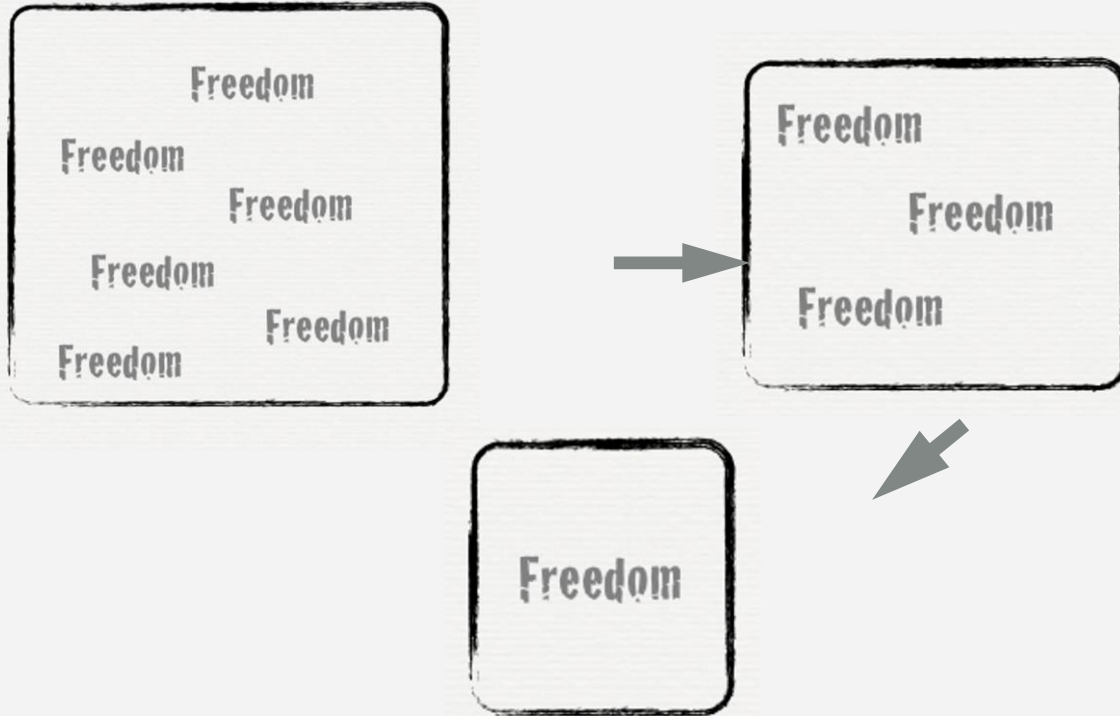
Practice the full call coaching process with your 'rep.'
Use these steps:

1. Rep and manager annotate/score a call asynchronously (**Observe, Describe**)
2. Focus on 1 or 2 things to change (**Prescribe**)
3. Role play and praise the new, changed behavior
4. Set goal for next time and track progress
5. Repeat



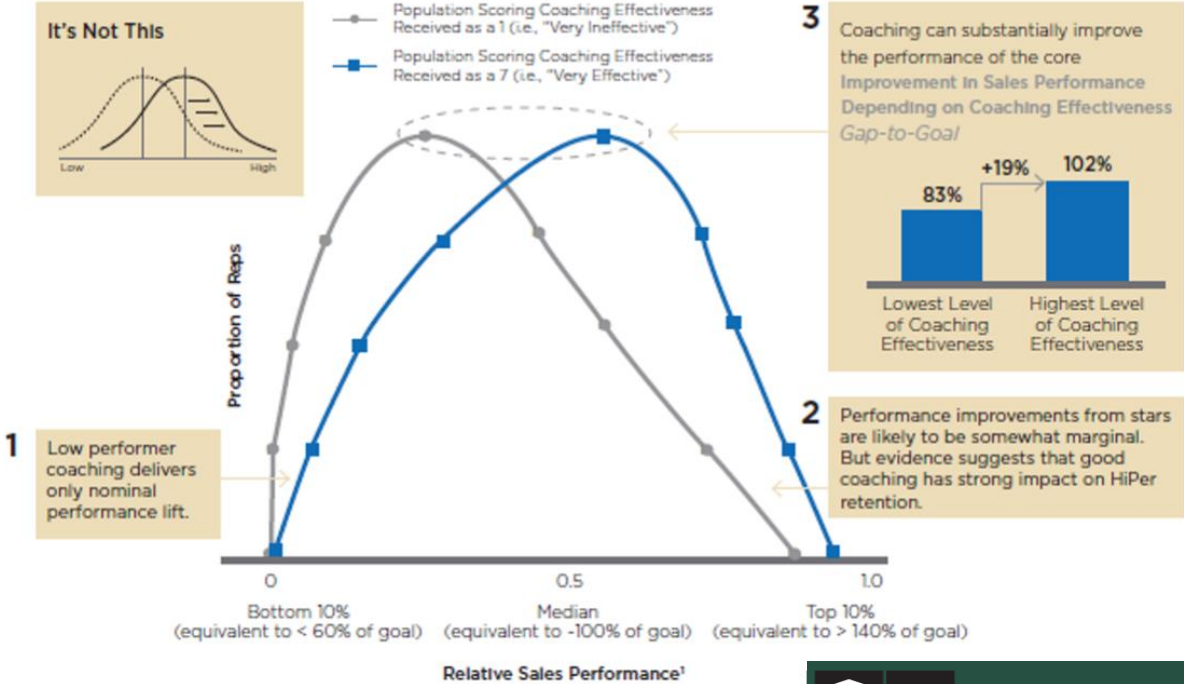
**What if Someone
Rejects Coaching?**

Degrees Of Freedom

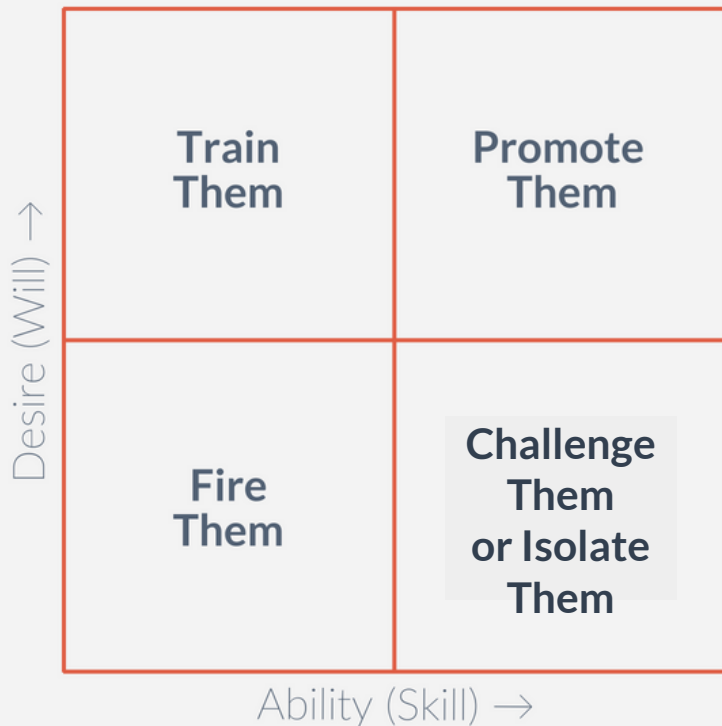


Who to Coach

Distribution of Relative Sales Rep Performance by Coaching Effectiveness



Map Them: Skill vs. Will



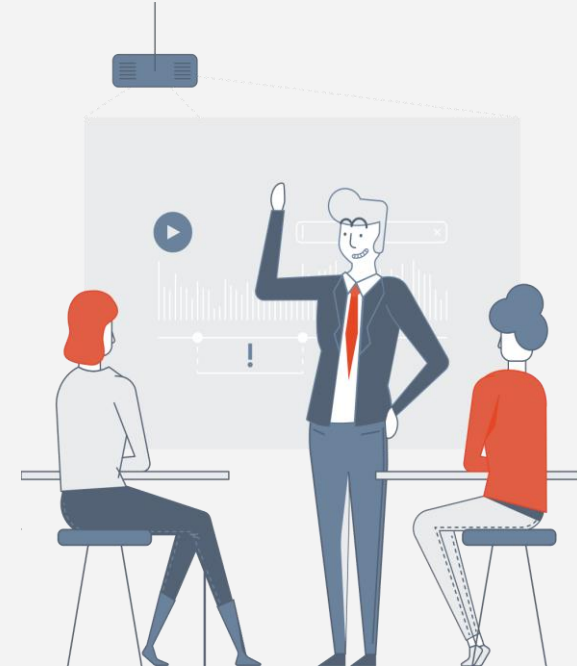


Pair Exercise

Map your team on the skill vs. will matrix.

Based on what you see:

- Who should you start coaching more?
- Who should you coach less?
- Who should you coach / manage differently?



**How Can We Leverage
a Rep Who Has
Achieved Mastery?**

What Should I Do When a Rep Rejects Coaching?

Do you have an environment of trust?

A-OK

Is the culture positive and productive?

A-OK

Where is the rep on skill vs. will and middle 60%?

A-OK

Does the rep disagree with the definition of good?

A-OK

Have you done an assessment of your own coaching?

A-OK

Does the rep respond better to other coaches

synchronous or asynchronous?



THAT'S IT!

Use the resources from this program to fix it.

**Every Coaching Plan
Has Discrete Elements**

Call Coaching Plan

Build your sales coaching plan.

1. Format (1-1, small group, team, department)
2. People Getting Coaching (Rep or Reps)
3. Coach (person delivering the feedback)
4. Duration (amount of time)
5. Frequency (how often)
6. Modality (synchronous/asynchronous)
7. Content (what behavior is being coached)
8. Calls (how many/what parts of what types of calls)

Coaching Activities

Current State

Ideal State

Shadow with headset splitter and hope to hear something worthwhile

Onboarding

Listen to examples of annotated top calls to guarantee learning something worthwhile

Pull a call recording ad hoc

Rep Self-Review

Rep listens to 1-2 calls per week, comments, scores, and shares with manager

Sit side-by-side waiting for a coachable moment

Manager Coaching

Find, review, annotate, and score any call at any time for maximum impact

No good way to hear what peers do on calls

Team

Do call reviews with small groups of peers to learn from collective experience

At pre-scheduled, recurring meetings or ad-hoc, on-the-fly spot coaching

Frequency

On-demand, without schedule constraints to make habitual, repeatable, scalable.

Development Plan

Observation Cadence	Frequency	Topic	Objective
Review Sales Calls	Weekly	Improve tactical selling behaviors (asking questions, messaging, deal strategy, call flow, objection handling)	Improve the day to day skills of selling (getting better at core job)
Personal Development and Growth	Every 6 Weeks	Strategic, longer-term growth, strengths and weaknesses, aspirations	Improve the person, biases, blind spots, attitudes, knowledge base etc.
Territory & Business Planning	Quarterly	Ability of the rep to manage their own business and execute the plan	Strengthen the ability to deliver, tying the two together
Performance Reviews	Annually	Results and Behavior Assessment	Feedback on where they stand and are they meeting expectations

Track For Accountability

EVERYONE, from brand new sales reps to the Chief Revenue Officer, should know who is and is not doing what they are supposed to do.

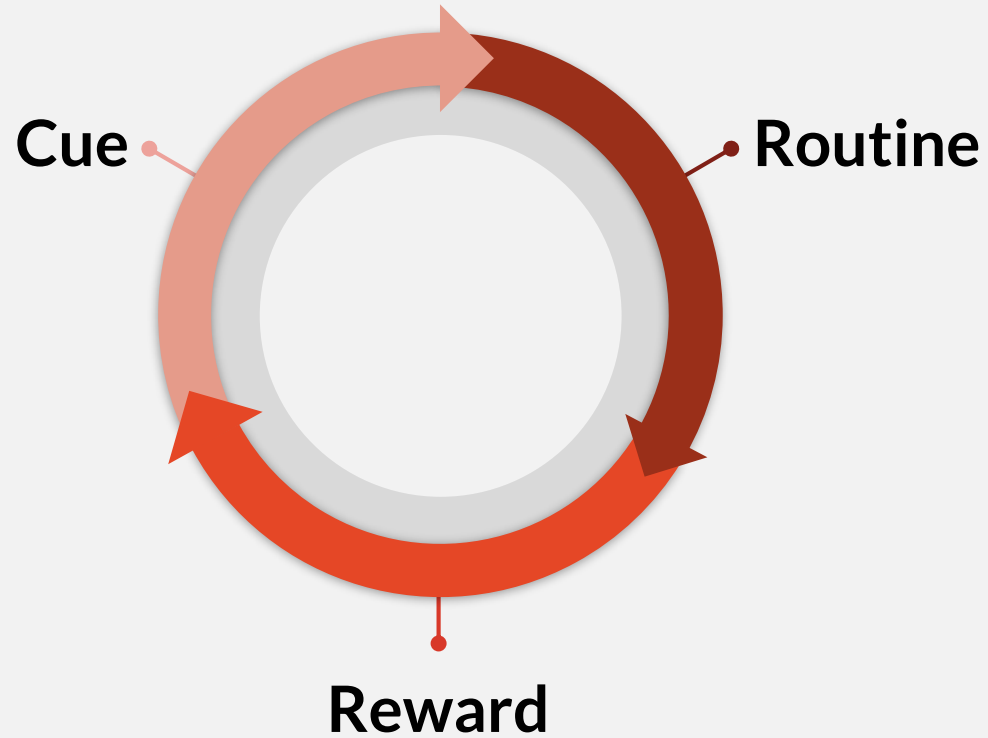
A defined process makes it clear when someone drops the ball. Is a rep not submitting calls for coaching? Is a rep not listening the skill-based recordings? Are managers not coaching?



Expert
Tip

Make sure your processes and technology can give sales leaders the visibility they need to keep frontline reps and managers on-track and accountable to their coaching plans.

The Habit Loop

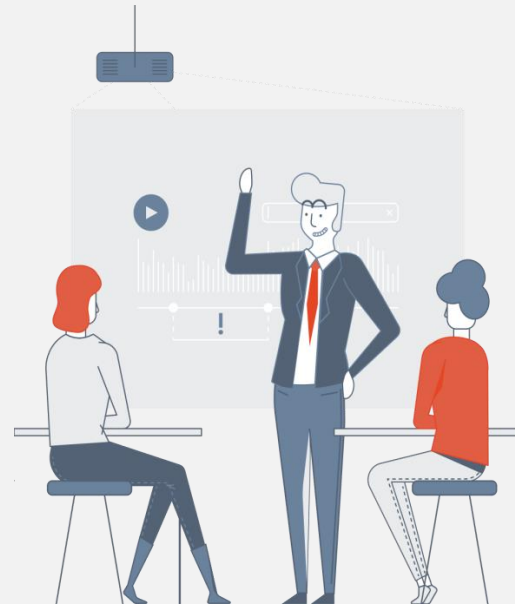




Team Exercise

How can you harness the power of the habit loop to encourage behavior change?

- What habits do you observe with your team, good or bad?
- What cues are you looking for?
- What rewards can you provide?



Sample Cues

1. Who sits next to who
2. Calendar invite (recurrence)
3. Socializing with cube mates (and other distractions)
4. Tracking via whiteboards & dashboards
5. Picture of family at desk
6. Slack
7. Coming in early/seeing empty office
8. Stand up meetings/huddles

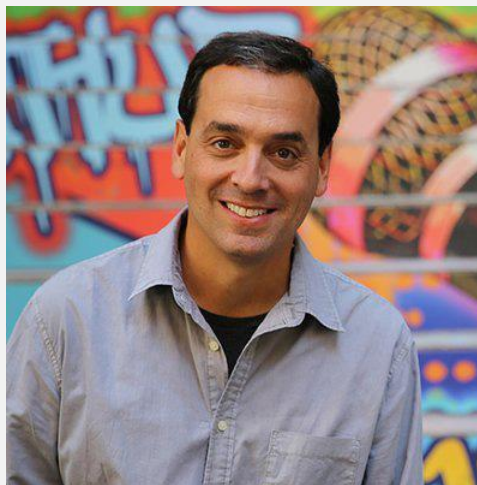
**Who Motivates
Your Reps?**

Dan Pink's Book *Drive*

Autonomy

Mastery

Purpose



**Expert
Tip**

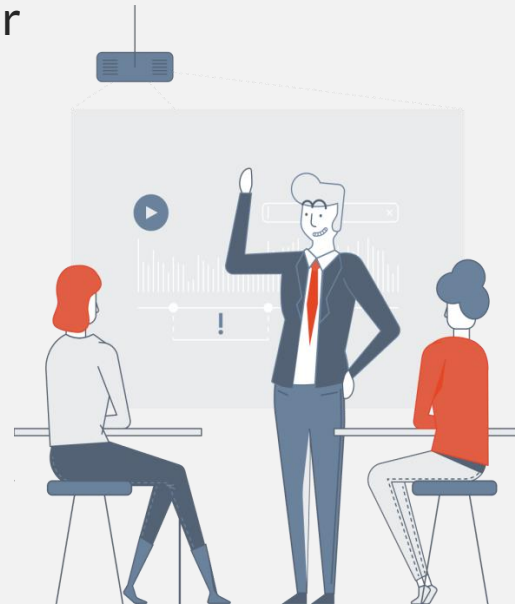
By getting people involved in their own development they feel a sense of autonomy and engagement that is core to a positive and productive sales coaching culture.



Team Exercise

If reps motivate themselves, what environmental factors can you control?

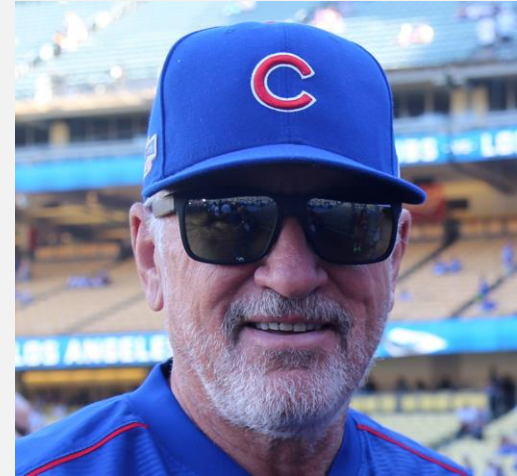
- For example change the comp plan, short circuit the habit loop with a new cue, leverage the rep's peers, offer clear career path, etc.



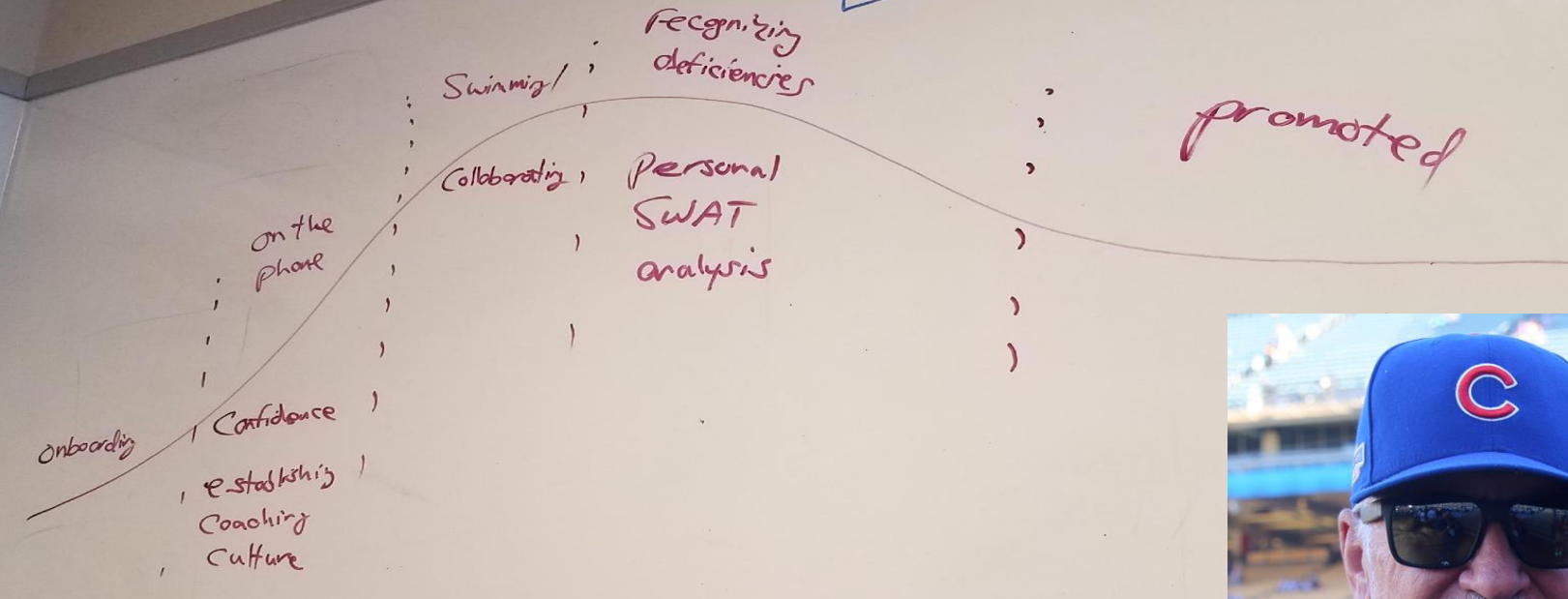
**How Can I Make the
Time to Coach?**

Joe Maddon's 5 Stages of a Ball Player

1. I'm happy to be here.
2. I want to stay here.
3. I belong here.
4. I want to make as much money as possible.
5. I want to win.



Joe Maddon's Player Development Stages



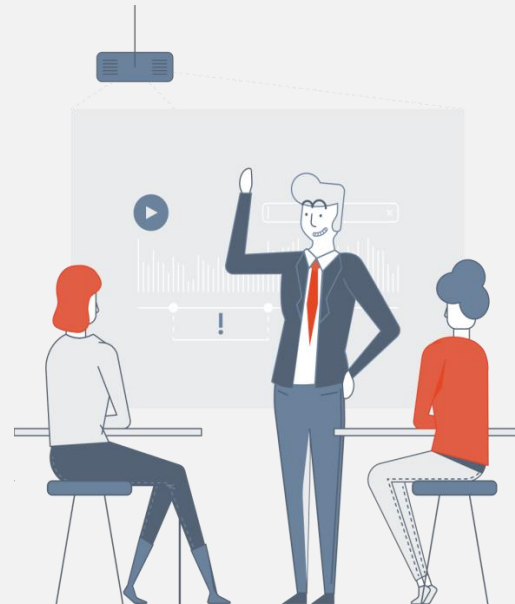


Pair Exercise

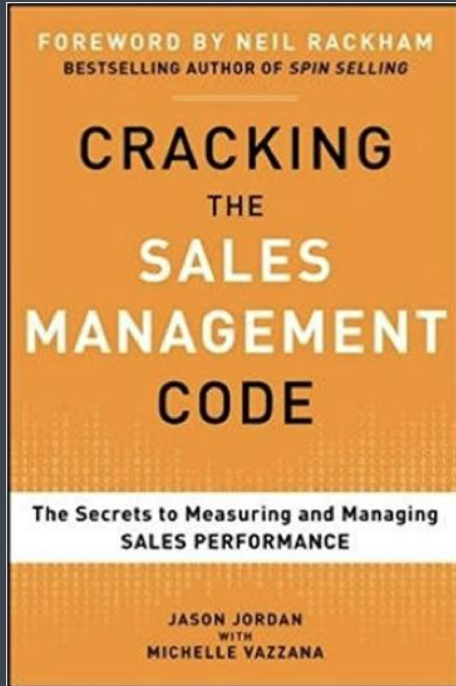
Map your team on Joe Maddon's Stages of Player Development.

1. I'm happy to be here.
2. I want to stay here.
3. I belong here.
4. I want to make as much money as possible.
5. I want to win.

Based on what you see, how can you get these people to use ExecVision differently based on his or her stage?



Prerequisite: Metrics



A

Results - you can't control these

B

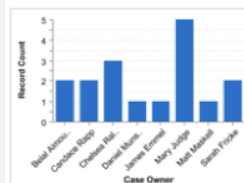
Objectives - you can sort of control these

C

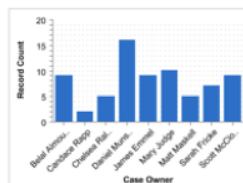
Activities - you can directly control these

Metrics as a Diagnostic

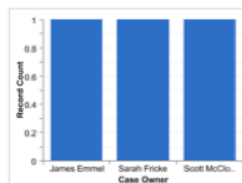
Meetings SCH this week



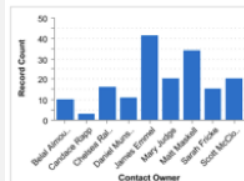
Convo #1



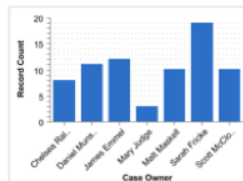
Convo #2



New Contacts Created



New Cases Created



Overdue to be completed



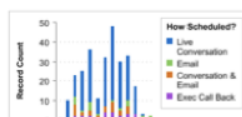
Reschedules



How Sch this week



Time zone sch



- Empower people with metrics
- Use metrics as a diagnostic





Pair Exercise

Come up with two sets of R-O-A metrics that are relevant to what your team does

Results

Objectives

Activities

**How Can You Hold
People Accountable
Without Observable
Moments?**

Recap

You learned how to:

1. Set organizational prerequisites
2. Gain alignment on goals
3. Define what 'good' looks like
4. Coach calls the right way
5. Determine who to coach and how much
6. Create fun coaching plans that people like
7. Track to hold people accountable

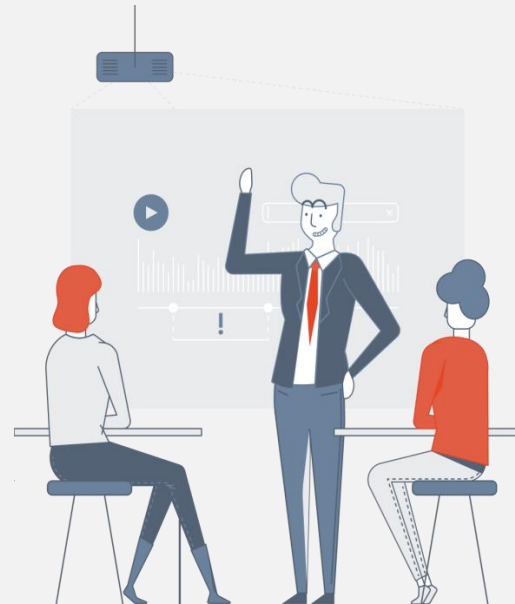


Group Exercise

In pairs recap what we covered.

1. What was the most important thing for you?
2. What will you do differently moving forward?

If you don't change your own behavior, then this workshop was a huge waste of our time and effort.



#Kaizen

Refers to activities that continuously improve all functions
and involve all employees from the CEO to the assembly line
workers

EXECVISION

ExecVision is software that makes it ridiculously easy to coach call recordings, share examples, and build a library of top calls.

Sales teams use ExecVision for onboarding, training, and continuous improvement.

Want a coaching culture? Let's get started.

<http://execvision.io>

The Sales Leader's Guide to Building a Coaching Culture



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 Nancy's'?
- Determine how you intend to roll this out i.e. a select group, one team, or organization-wide

Create Leadership Buy-in

- Build out a list of benefits and data for executives
- Show managers how it will help them hit their numbers
- Tie coaching activities to revenue impact

Clearly Define What 'Good' Looks like

- Schedule a meeting with all coaching stakeholders
- Ask everyone to write down the 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-to-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 is present in the different scores for call elements
- 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 in line with brain science for how adults

Upcoming CoE Webcasts



Product Webcast: The Product Commercialization Process

Thursday, March 21st at 2:00 p.m.

Jay Naik, *Operating Partner*



Finance Webcast: Risk & Compliance: Protecting Your Assets and Preparing for Exit

Thursday, May 23rd at 2:00 p.m.

Eileen Covey, *Director of Finance & Operations*



Erin Burns Walters, *National Practice Advisor*



THANK YOU

for joining us