

The Sales Leader's Guide to Building a Coaching Culture



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Why Coaching?

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 know 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 such as:

20% higher revenue

35% increase in 1st 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.

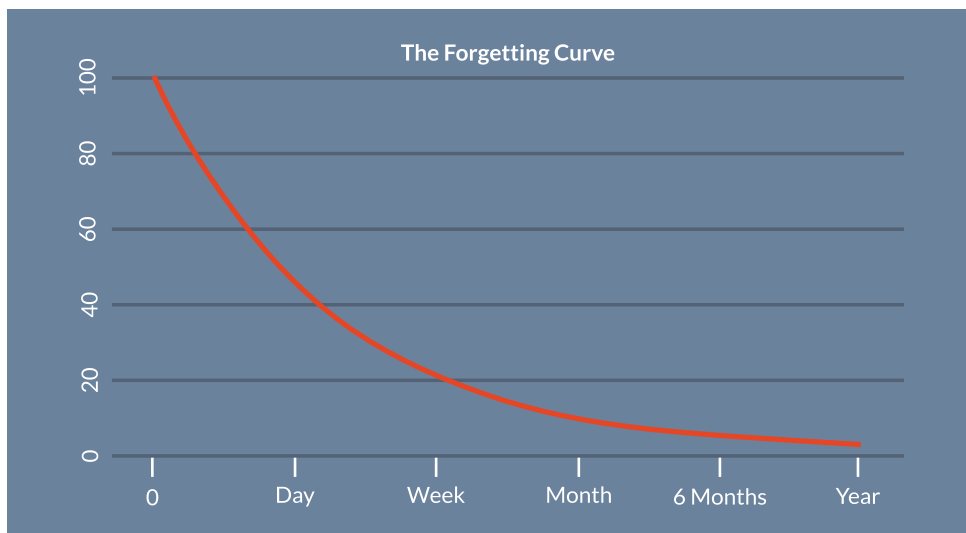
Phase I: Identify the Why

In order to create a successful coaching culture, the first step is to identify your 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 87% of sales training is forgotten within 30 days. 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 and becomes second nature for your sales team.



After you've uncovered why you need a coaching culture, it's necessary to review the current coaching atmosphere and any roadblocks you may encounter while building a coaching culture. Evaluate pain points of your existing sales culture 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 unconsciously competent 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 Nancy's' in the bunch?
- Is there a foundation of trust anchored by the comp plan and career path?

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 important to remain objective while evaluating the current culture. Do you know who your existing culture champions are? These are salespeople who come in smiling every day and try to create a fun environment. They are influential on their peers. They are also the first people you'll want on board for rolling out a coaching culture.

Once you have a clear picture of where you're starting and what might get in the way while you create a coaching culture, you can begin to plant the seeds.



Phase II: Establish a Baseline of 'Good'

The key to embedding coaching into your sales culture is getting the management team bought in and clearly identifying what 'good' looks like for your organization. Without either of these, you'll be spinning your wheels trying to make coaching happen.

Getting leadership bought into a coaching culture is fairly 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.

For managers, it's all about replicating top performers. Instead of having to rely on the few 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 cancelling non-vital meetings and evaluating if there is a way to make coaching easier. Smart companies are getting their reps involved in their own 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 greatest business impact from coaching.

Defining 'good' will require everyone to think about your sales process and call flow frameworks as agnostically as possible.

After leadership has seen the value coaching offers, you will need to come to an agreement about what constitutes a good call. This may be a challenging exercise, especially if your leadership team subscribes to different sales methodologies.

The objective of this session will be to build out a scorecard. Ask each manager to write out 5-8 of the most important 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. These behaviors will be rated on a scale 1-5 These behaviors will be rated on a scale 1-5:

Action Item:
Make scorecards mandatory. Reps should complete scorecards for two of their own calls per week before being able to see what managers + peers scored the calls.

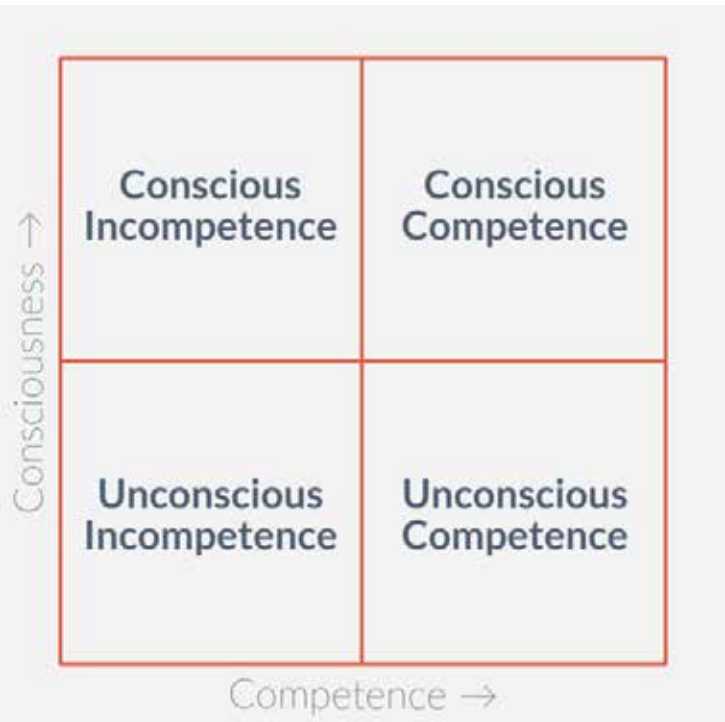
- 1 means the behavior is not present
- 2 means the behavior is present, but done below average.
- 3 means the behavior is present and average
- 4 means the behavior is there and the rep did a good job, but there is still room for improvement
- 5 means excellent
- Also use N/A for behaviors that don't make sense in the context of that particular call. The name of the game is objectivity

To align everyone on what a 1 is compared to a 3 or the differences between a 4 or a 5, play calls during a synchronous call review session. Everyone present will complete a scorecard for the call, 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 a good time to establish or review the baseline for conversations at your organization. Identify what best-in-class is for:

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

The goal is to move reps from a state of being unconsciously incompetent (they don't know why they are bad) to a state of conscious incompetence (they know why they are bad) then to conscious competence (they know why they're good).



Phase III: Build Out Your Coaching Playbook

One of the biggest mistakes sales managers make is coaching too much. Build out a playbook for coaching sessions so managers know when, how, and who to coach.

Now that you have a baseline for calls, you have to establish a baseline for coaching sessions. One of the biggest mistakes sales managers make is coaching too much. When you try to cram too many things into one coaching sessions, reps get overwhelmed and effectively shut down to constructive 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

While building out your playbook, consider adding coaching-based incentive programs. Call of the Month contests are particularly effective at driving peer-to-peer coaching. These contests celebrate quality over quantity and provide a nice break from the same top performers winning incentives week after week. Every rep picks their best call from the previous month, annotates it, scores it, then shares it with their manager. The managers select the best two calls from their teams and share them up 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 easily build a call library from these excellent call examples.

Need a jump start for your coaching plan?

[**Download the Ultimate Sales Coaching Playbook**](#)

Must-Haves for Every Coaching Playbook

Format

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

Audience

Rep or reps

Coach

Duration

How long sessions will be

Frequency

How often sessions occur

Modality

Synchronous or asynchronous


Content

What's being coached



Phase IV: Selling Your Sales Team On a Coaching Culture

Coaching culture does not happen overnight. Once it's time to implement this new initiative, we highly recommend you do not do it through an all-hands meeting.



Action Item: Require reps to participate in making coaching easy by sharing 1-2 calls with their manager per week.

Think of the last sales kickoff you attended where leadership announced a sweeping organizational change. How many groans did you hear? That's exactly what you want to avoid 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 will 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 them in coaching session calendar invites. Coaching culture has an added benefit of building better bonds between managers and reps, and between teams. As a manager, it's important 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 between how and what you coach them on, in addition to scorecards. This eliminates the "I don't need coaching" that can happen when a rep has a particularly good week.

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 shred, they'll be more open to a coaching culture.

Coaching culture also helps drive in-role progression. When managers and reps both know the exact steps to promotion, coaching sessions can be used 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.

Phase V: Setting Expectations for Coaching Resistance

As with any big change, there will be some resistance. Your seasoned reps may say “I don’t need to be coached, 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 failure to improve over x sessions, not sharing calls with managers, or ignoring feedback entirely.

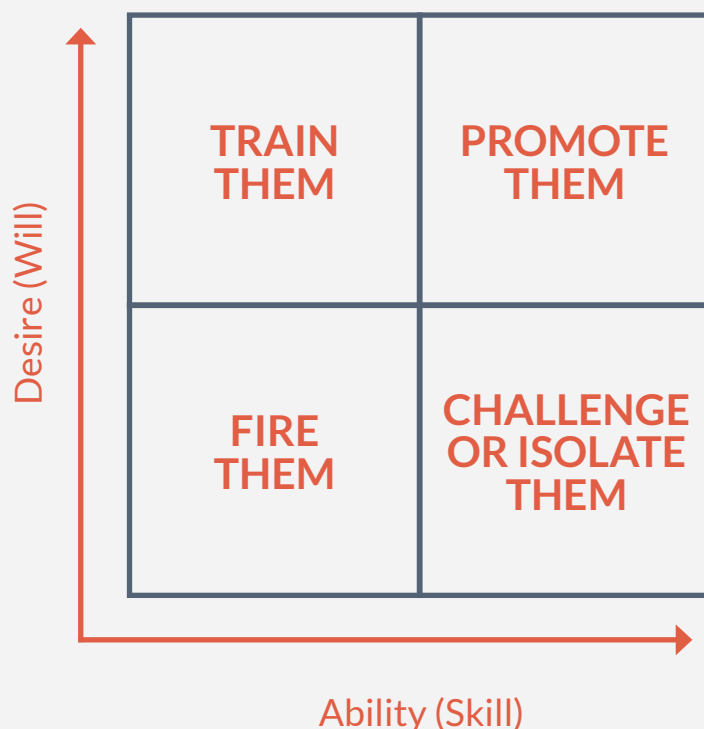
Now that you know what to look out for, your management team needs to agree on how to manage these reps. Consider actions such as:

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

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 coach.

The good news is most reps want to be coached. 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.

Action Item: Map your team using this matrix to identify reps who may not take to coaching right away.



Phase VI: Make it Last

The average tenure of a sales leader is less than two years. The reality is that your hard work building a coaching culture may go to waste as soon as you move on to a new role or find yourself out of the office for an extended period of time.

First, be sure all of your new hires fit a coaching culture. Culture fit has long been a check box of hiring processes, but it's non-negotiable at organizations with a coaching culture. Know how to spot candidates that are coachable, those who may need some coaxing to be open to coaching, and red-flags of coaching resistance.

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 in the call library from the very beginning.

When new managers are promoted or a new manager is hired, it is paramount that they are invested in a coaching culture. Hold regular manager training sessions to ensure managers are aligned on what good looks like and adding to your coaching culture rather than working against it. For managers that don't report directly to you, ensure they're empowered to own coaching culture just as much as you do. Once or twice a quarter, check-in on the language and be sure managers are still coaching the same way.

Teach managers how to coach using systems like observe, describe, prescribe and the below framework:



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 good call. You can also spontaneously ask reps to write down the different parts of a 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 (and 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 taken to the next level i.e. how did this call impact the deal?

Morris Charts

Part VII: Measure & Celebrate

Sparkline Charts

Line Chart



Easy Pie Charts



Bar Chart



Donut Chart



Bar Chart



Pie Chart



Remember those metrics you set out to improve on 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 good metrics to benchmark and review each quarter:

- Average # of meetings set per month (per rep and as a whole)
- New hire ramp time
- Lift in productivity of the '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 where your team is at will also help inform any tweaks that need to be made 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 the 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.

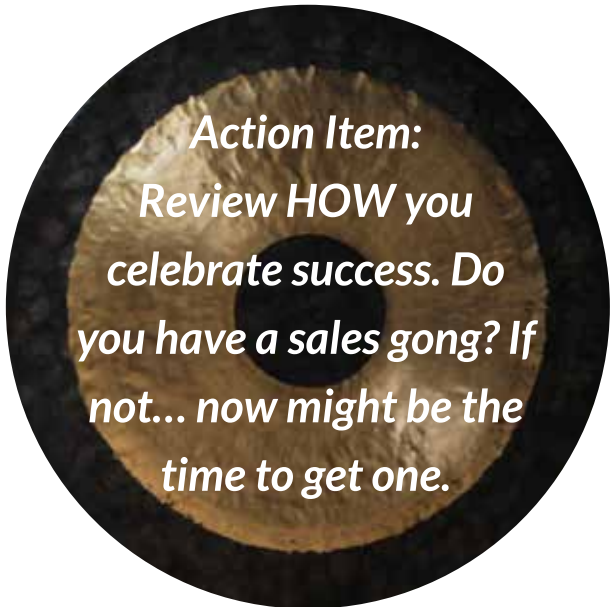
And when your team starts to kick some serious butt, celebrate.

Coaching culture will stick when you recognize the success of your team. Congratulate reps as they move up the leaderboard. Praise managers when their whole team sees an improvement in performance. Give praise publicly and leverage stories of success from individuals to motivate the whole team. When reps see their hard work pay off and they get recognized for it, they'll remember that 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. Have conversations with leaders outside of your organization to see what's working and what's not working for their sales teams.
2. It bears repeating: 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. Coaching culture is a worthwhile, long-term investment with big payoffs.

What steps will you take today to build a coaching culture with your sales team?



***Action Item:
Review HOW you
celebrate success. Do
you have a sales gong? If
not... now might be the
time to get one.***

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 change 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 universal coaching, regardless of level or title

Measure Your Coaching ROI

Benchmark these metrics:

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

Measure them quarterly and tweak your coaching playbook when necessary

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-like software?
- ☐ Create incentives for quality metrics in addition to quantity metrics