

THE INTERNATIONAL

# Journal of Sales Transformation

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# Opportunity coaching for fun and profit

✎ Bob Apollo

**Y**ou'll notice a number of articles elsewhere in this edition on the subject of coaching. I want to use this short piece to focus on an area that has become a particular interest of mine: using coaching techniques to help our salespeople develop more effective opportunity strategies.

I've observed organisations that do a particularly effective job of opportunity coaching, viewed others at the opposite end of the scale that appear to ignore the topic altogether, and seen and experienced most points in between.

## Success factors

There seem to be a handful of consistent success factors: first, the effective organisations set clear expectations for how opportunities are to be managed. They have defined sales frameworks that guide salespeople in what they need to know and do at each stage of the process without restricting their creativity or initiative.

Next, these best practices must be embedded into the CRM system, so that the opportunity record provides a single source of truth regarding the true nature and state of the opportunity. Rather than being an administrative burden, the CRM system must act as a first-level coaching stimulus to ensure that salespeople are thinking clearly about every opportunity.

Effective managers make a clear distinction between forecast reviews – in which the sales person is expected to reconfirm their expectations regarding deal value, projected close date, probability and next steps for all the forecastable opportunities in their pipeline – and individual opportunity reviews, which go into much more detail on a smaller number of individual opportunities.

When reviewing individual sales opportunities with salespeople, effective sales managers expect (and require) the information contained in the CRM system to be complete, up-to-date and accurate and make it clear that they

expect salespeople to come to each opportunity review properly prepared. Where critical information is currently unknown, they expect the salesperson to proactively fill in the blanks, rather than wait to be asked.

When we have the benefit of this sort of foundation, opportunity coaching can make reasonable assumptions about the accuracy of core information, and the time invested in 1:1 coaching can be directed towards higher-impact matters.

This approach frees up managers to pay deep attention to critical success factors such as the salesperson's understanding of the internal politics of the opportunity, the strength of the prospective customer's business case, the dynamics of the competitive landscape and of the decision-making group and process, and on the unique value we intend to create for the customer.

## Challenge

Effective opportunity reviews challenge our salespeople to consider what they really know about an opportunity, to recognise where they may have made untested assumptions, to acknowledge what they ought to know but don't and what they ought to have done but haven't.

For the salesperson, an opportunity review ought to be a stimulating but sometimes uncomfortable process. It should give them the chance to assess their opportunity strategy from a fresh perspective. It should encourage and reward self-awareness and self-honesty as well as creativity and lateral thinking.

## Sales manager's role

The sales manager has a critical role to play in catalysing these thought processes – and as in every other successful coaching initiative, their intervention must serve to help the salesperson work out the appropriate approach for themselves and to learn through the process rather than having

the sales leader make decisions on their behalf.

I know how difficult this can be for sales managers, particularly those who have only recently come up from the ranks. It can be tremendously tempting to jump in, seize the wheel, and take control of the opportunity – but this will never generate lasting improvement.

It's much better to invest our management time in implementing the right foundations in the form of a dynamic sales framework and in coaching our salespeople how to think clearly and apply best practice. At least, that's my experience.



## About the author

Bob Apollo is the founder of UK-based Inflexion-Point Strategy Partners, the sales process improvement specialists. Following a successful career spanning start-ups to corporates, Apollo now works with a growing client base of B2B-focused scale-up tech-based businesses, helping them to systematically establish their uniquely relevant value to their customers.