MindTickle

Checklist for Effective Remote Coaching

Enabling Frontline Managers and Field Teams for the Next Normal

At its core, sales coaching is the ongoing, one-on-one development of each individual on a sales team, but it is not a one-way street. A productive coaching relationship is a living interaction combining observation and conversation between the rep and a coach. The focus is on maximizing the rep's ability to execute to his or her greatest potential in view of the capabilities defined as the profile of an ideal seller.

This requires several guiding principles—for example, in 1:1 meetings such as weekly check-ins, the rep does most of the talking while the coach listens, observes, and offers feedback. In shadowing or ride-along meetings for manager coaches, this might mean being a silent participant (albeit in the current climate, this might be attending a web meeting in view only mode or reviewing a call recording together with the seller).

Coaching is different from equally critical training processes such as onboarding or launching new products or solutions, where information is presented to many reps at one time. It's also unique from upskilling on new products or technical competencies, which can happen in many different forms, including virtual training and micro-learning. There is overlap between coaching and mentorship, but there is also some distinction. Equally important is the distinction between coaching and managing, though effective managers often exhibit great coaching instincts and skills. Coaching defines conversations, exercises, and activities focused on specific tasks or objectives with a guiding rubric. Mentorship is more aligned to focusing on more general goals or overall development.

Some key questions to ask

- [ ] Are managers enabled to drive critical coaching interactions relating to how they assess, reinforce and remediate skill gaps based on a common rubric?
- [ ] Are coaches equipped with the tools and skills to observe and monitor both live and post-meeting interactions with prospects and customers to identify opportunities for intervention and spot coaching?
- [ ] Is the field team consistently surveyed on the quantity and quality of the coaching interactions they are having and the follow up to meetings or calls?
- [ ] Are sales executives and company executives aligned with creating a coaching culture and investing in the tools, systems and processes required to build and maintain an organization of world-class coaches?
- [ ] As an enablement leader, can you provide visibility to your leadership team around the coaching competency and outcomes of coaching assessment over time and across teams in an all-remote or hybrid environment?
- [ ] Do your learning, skill development and field training initiatives feel connected and engaged with coaching initiatives and strategy in these uncertain times?

At the core of answering these questions is a program that inspires and excites your workforce with personalized, productive and supportive coaching interactions that reinforce and remediate positive and consistent behavior that drives effective selling and customer experience. Use this blueprint to develop a successful coaching apparatus composed of pre-work activities, coaching process and performance and measurement.

Coaching Pre-work

In order to effectively execute coaching sessions between managers and their team members, begin by identifying the goals of the coaching program, determining the cadence of sessions, and defining consistent coaching parameters across teams, including expected feedback and action items from each session.

Program Structure

- [ ] Develop a coaching culture.

  - ✓ **Frame coaching accurately for your organization.** Why is setting up an ongoing meeting between manager and rep beneficial? What does each party gain from the experience? How does the organization benefit? Coaching just to say you coach isn't enough; you need to understand your audience and the goals you're hoping to achieve (e.g., experienced managers advise reps on how to close more deals; a younger workforce benefits by learning from others; a separated workforce now regularly meets and develops rapport, etc.). Make sure the coaching program reflects the needs of the organization.

    There are two main types of coaching programs:

    OPPORTUNITY COACHING

    - ✓ What: Account problem solving
    - ✓ When: Weekly pipeline review or as needed
    - ✓ How: Discussion in-person or over the phone

    SKILLS COACHING

    - ✓ What: Sales rep knowledge and skill development
    - ✓ When: Planned quarterly with weekly or monthly visits
    - ✓ How: Observation followed by coaching debrief

  - ✓ **Ensure buy-in from both managers and reps.** The best way to establish commitment is to show benefits to both parties. Reps can learn best practices and get feedback from managers, while managers can support their reps and hit their numbers. If both sides understand that these coaching sessions benefit their end goals, they'll be more inclined to participate.

  - ✓ **Coaching is a two-way street.** When developing expectations, allow for manager and rep feedback. While a top-down approach is more traditional, there's value in feedback from the frontlines. It will help identify which coaching programs are or are not working and ensure coaches are being effective as well.

  - ✓ **Tie coaching to compensation.** In some organizations, executives ensure coaching is taken seriously and completed by withholding commission until all training is completed (or achieving an 80% or higher passing rate), including coaching. As sales reps tend to be money-driven, this is an effective way to ensure program participation.

- [ ] **Set coaching parameters that correspond to reps' KPIs.** To further buy-in and ensure reps hit their goals, develop evaluation parameters that guide coaches to address key messaging or skills that reps need to achieve their KPIs. For example, evaluation parameters can be as followed:

  ✓ *Is the rep aware of the client's domain (i.e., industry, market, etc.)?*

  ✓ *Does the rep communicate effectively and succinctly? (E.g., limited filler words, follows clear project plan, adjusts pitch based on persona, etc.)*

  ✓ *Did the rep accurately discuss product functionality?*

To provide precise evaluation parameters, some sales readiness platforms like MindTickle allow various responses to evaluation parameters:

RATING SCALE allows the coach to assign a rating value to the rep based on a scale (i.e., 0–10, 1–5)

MULTIPLE CHOICE allows the coach to pick one of the multiple options provided (i.e., Yes/No; Excellent/ Moderate/Low).

TEXT INPUT allows the coach to enter text feedback

- [ ] **Encourage written feedback.** The more comprehensive and precise the coaching feedback is set up and structured for consistency, the more benefit the rep will receive. Feedback should include constructive assessments, encouraging comments, action items and next steps. Not only will the rep benefit by incorporating this feedback into his/her next conversations, but the coaches can then reference their feedback during the next coaching session to ensure the rep is improving.

- [ ] **Figure out where you want the program to go.** As you develop your coaching program, think about what results and goals you have for this program. You'll want to be able to measure, follow-up and share these findings throughout the program. For example, you will periodically want to:

  ✓ Recognize KPI improvement overall and recognize learners who have improved.

  ✓ Provide a summary of overall proficiency strengths, gaps, and improvement percentages.

  ✓ Work with frontline managers to understand any gaps on their team.

  ✓ Share program insights and outcomes with senior leaders.

  Make sure you've identified and set in place the resources that will allow you to track and share this data.

DURATION AND TIMING

- [ ] **Set a realistic coaching cadence.** Coaching cadence can depend on a variety of factors: salesforce maturity, coaching goals, sales productivity, etc. With a more mature salesforce who consistently hit their numbers, you might not need to host coaching sessions every month, but instead once a quarter.

Conversely, reps entering the field who might not understand the nuances of your business might need more one-on-one time with their manager and would benefit from weekly or monthly coaching sessions.

Furthermore, the cadence will depend on whether you're coaching to a specific opportunity, skill or behavioral gap. Opportunity coaching can be incorporated into the manager and rep's weekly pipeline review or as needed. Skills coaching can be planned quarterly with weekly or monthly visits.

- [ ] **Continue coaching.** Whatever cadence you decide on, ensure that it's continuous without too much variance in scheduling. When coaching becomes an ingrained part of manager and rep rapport, the effects can be more easily tracked and measured over time.

CONTENT

- [ ] **Create coaching forms.** As mentioned previously, there are two main types of coaching: Opportunity Coaching and Skills Coaching. Depending on the type of coaching you're hoping to achieve, customize the coaching form to guide the coach on critical areas to address in each coaching session.
    - ✓ Opportunity coaching is more informal and specific to the opportunity stage and each rep's pipeline. You can offer some leading questions, such as *Has the rep done his/her due diligence to research the company and its current goals?* or *Has the rep identified the competitors in this opportunity?*, but the actual coaching will come from the manager's knowledge and experience.
    - ✓ Skills coaching, on the other hand, can benefit from a coaching form where coaches are asked to evaluate each rep's soft skills, such as demeanor, communication, effectiveness, etc. Since the coach is observing throughout the session while a rep is on a sales call or customer meeting, it can be helpful to write down notes in the coaching form and reference them later in the follow-up. Coaching forms can also help provide a comprehensive and collated view of where each manager's teams are at since each manager is using the same form.
- [ ] **Utilize coaching templates.** Some sales readiness platforms like MindTickle provide coaching templates to quickly give you a head start in your coaching initiatives. These templates have been designed for different audiences, competencies, processes, and scenarios, and allow all relevant coaches to follow the same format and evaluation parameters when conducting sessions. Simply pick the most relevant template for your coaching goals, and customize if needed.
- [ ] **Organize your coaching forms.** The easier you make your coaching forms, the more your coaches will use them. A well-laid out coaching form comes across as well thought-out and intentional, and allows the coaching session to flow better.
    - ✓ **Sections** can organize coaching parameters by topic, area, task or other criteria relevant to your initiative.
    - ✓ **Evaluation parameters** are guidelines which define the expected behavior of an individual on the field or on the job. They can be specific to an initiative, such as *"Did the rep determined definitive next steps at the end of the call?"*, or more interpretive, such as *"Could the rep speak to the client's use case, industry, and/or market?"* Evaluation parameters help guide ongoing skills development as coaches and sales administrators can track progress over time to ensure reps are improving, or if not, develop training to address their needs.
    - ✓ **Reviewer guidance** advises the manager or coach about how to evaluate the rep on the parameter to minimize various interpretations of evaluation parameters across coaches.

Messaging and Communications

As with any program, positioning and effective communication have a significant impact on engagement. Always get buy-in from senior leadership, and identify an executive sponsor who can help with communications to further drive motivation and commitment to the coaching initiative.

BEFORE LAUNCH

Prior to launching your coaching program, messaging you send out should focus on the goals of your organisation's coaching culture, confirm engagement of both managers and reps, and set expectations for all involved. Below are communications or action items that should come from each stakeholders as you prepare your coaching programs.

- [ ] Senior Leadership
    - ✓ Record a video or host a fireside chat about the importance of a coaching culture to share with the sales org. Discuss the alignment needed from all involved, the expected impact on field performance and personal performance, and how they will measure data and pivot strategies around insights. Reinforce the importance of commitment from both parties.
- [ ] Enablement Leaders
    - ✓ Train front-line managers on how to be an effective coach. Reps are often promoted to manager because they're successful reps. However, this doesn't mean they'll automatically be successful managers. Set up managers for success just as you would anyone starting a new job.
        - ✓ Include a model coaching session between an executive and their most successful rep.
        - ✓ Explain how to effectively use coaching forms to document, follow-up and track sessions.
        - ✓ Create a dedicated forum or Slack channel where coaches can go if they have any questions or need advice on a difficult topic or situation. Actively share tips and tricks or highlight well-used coaching forms in this channel.
    - ✓ Hold a Q&A session with your salespeople.
        - ✓ Describe how the coaching program will help them succeed in the field. Emphasize that coaching will reinforce and drive knowledge and skills they need to succeed and will provide an opportunity to identify gaps in skills and improve overall personal performance.
        - ✓ Describe the experience: how often each rep will meet with their managers; the feedback loop of each coaching session; how to reject a review submitted by a coach and the necessary next steps; and any other necessary information to ensure a smooth coaching experience.
- [ ] Frontline Managers
    - ✓ Follow-up the executive communications with your own message to your team. Emphasize the importance of alignment and the overall benefits of coaching, including better field performance and personal development for each rep. Set expectations for coaching and program participation.
    - ✓ Schedule the first coaching session between you and each of your reps.

- [ ] Salespeople
  - ✓ Ensure your manager has scheduled a coaching session, whether it's for opportunity coaching, skills coaching or both. If it's a skills coaching session, make sure you've invited your manager to the meeting to shadow your call. Prep as you normally would.

Coaching the Coach

In order for coaching to be successful, it is critical for the person acting as coach to be fully enabled on coaching best practices. Coaching the coach is itself a form of coaching and therefore should not be perceived as remedial. Run a refresher and calibration program with your coaches before beginning a coaching program; this will facilitate communication and change management for the program, ensure that the reps have a positive experience and will help create buy-in with frontline managers.

DURING

Throughout the coaching program, communications should focus on promoting engagement and reminding everyone of the opportunity to improve.

- [ ] Send monthly or quarterly reports to frontline managers cataloging their most/least improved sales rep, tracking the number of coaching sessions they've completed and other critical data insights that are relevant to improvement and can drive engagement.
- [ ] Send monthly or quarterly dashboards or reports to leadership, tracking the progress of the coaching sessions, highlighting the managers who are effectively coaching their reps, and identifying any areas of improvement.
- [ ] Create a leaderboard highlighting the most effective coach based on the most rep improvement over time or the greatest correlation between coaching sessions and sales success.
- [ ] Send short and fun messages to frontline managers and sales reps to keep them engaged and remind them of the importance of coaching.
- [ ] Encourage feedback or survey the managers and reps to continue improving the program.

Don't forget: Coaching is continuous so the program never really ends. Just remember to continue dropping reminders and communications to keep everyone engaged. Keep leadership involved with reports and dashboards that summarize the highs and lows of the program.

Coaching Structure

Imagine that your company just released a new, advanced product line that complements your existing suite of products. Your organization structures sales reps and account managers to align (by role) with small, medium, and large-sized prospects. Only larger enterprise companies are likely to fit the use-case for this new product, but leadership wants everyone fully enabled on the product as it is a valuable competitive differentiator in the market.

One approach fulfilling this enablement request would be to combine practice with tiered coaching programs.

- [ ] The reps need to have information about the new product taught to them.
  - ✓ Develop a Course with videos and knowledge confirmation questions.

- [ ] Next, the reps need a way to practice their understanding and articulation of the new product.
    - ✓ Create a Mission to allow reps to practice a simple 3-5 minute value pitch of the product on their own to ensure basic familiarity and competency before engaging in coaching.

After these stages, introduce a two-level coaching program: Basic and Advanced.

Basic

At the basic level, create a simple coaching program where the coach needs to listen in on a call once per week and rate the rep on how well they can describe this new product. The parameters for this coaching form might simply consist of:

Flow: how well was the rep able to pivot the conversation to discussing this new product?

Facts: how accurate was the description of the new product line?

Value: how well did the rep describe the value proposition of the new product?

Suitability: how well did the rep explain how the new product could help to solve the customer's need (if applicable)?

Require this coaching session would be required for all reps and account managers, and establish parameters rated on a scale of 1-5 with an average score of 3.5 required to pass. Once reps achieved a passing score, they would be able to stop participating in this Basic coaching program, while reps who earned below 3.5 would need to repeat the exercise.

Advanced

The advanced coaching would begin only upon completion of the basic coaching program and triggered only for the reps who are likely to need to actually sell the product (Enterprise Reps and Enterprise Account Managers) based on market fit. The advanced coaching sessions could be set to occur less often as it requires more depth, and the calls on which these conversations occur might happen less frequently. For the managers, staggering the coaching across several days provides flexibility so they are not coaching their entire team on the same day. Using a tiered approach also ensures you are focusing the more substantial effort on reps for whom selling this product is aligned to their actual work and asking for a level of depth of coaching that is appropriate for the managers to dedicate to this exercise. The coaching parameters for the advanced session would be more granular and likely involve sections.

INTRODUCTION

- [ ] Demonstrated preparedness by showing that reps have researched the company, its needs, and the fit in advance of the call
- [ ] Set the stage for a smooth transition for a discussion of business needs, challenges, opportunity
- [ ] Qualify that the correct people are in attendance to proceed

VALUE PROPOSITION

- [ ] Described the value proposition of the product correctly
- [ ] Described each feature accurately, factually, and made a clear case
- [ ] Explained how the product would address the business need

CLOSURE

- [ ] Asked about timeframe, vendor process, fund availability
- [ ] Handling of objections
- [ ] Handling of references to competitors

STYLE

- [ ] Overall rapport
- [ ] Flow of conversation
- [ ] Use of appropriate vocabulary and level of technical depth for the audience
- [ ] Focus on customer needs in demonstration
- [ ] Set up clear next steps and action items

Performance and Measurement

An effective coaching program must be aligned to the strategic objectives of your business and to the day-to-day activities of the reps.

Two categories of coaching parameters to consider are hard skills and capabilities (coaching); and soft-skills and performance (mentorship). You can think of these as being somewhat analogous to leading (building blocks) and lagging (outcomes) indicators in your sales performance data.

- [ ] Engagement
    - ✓ Monitor adherence data, completed sessions and average % score.
- [ ] Tracking progress
    - ✓ Review the final average % score and completed sessions.
    - ✓ Analyze Module data by parameter. In MindTickle for example, modules must be tagged with competency tags and users must be grouped.
    - ✓ Review overall scores and by competency (i.e. the evaluation parameters defined for the mission). Frontline managers can view their heatmap in MindTickle by Module name and user.
    - ✓ Spider chart will allow the coaches to focus on areas that need improvement instead of all parameters to make sure the best use of their time.
- [ ] Accountability of coaches
    - ✓ Look at reviewers: % adherence, total completed sessions and % disapproved sessions.
    - ✓ Review distribution of adherence of reviewers to see a graphical representation of reviewer's adherence to coaching sessions and historical trendline to see the number of coaching sessions scheduled or completed—break this down based on duration (monthly, weekly, daily) or by reviewer.

- [ ] Soft skills
    - ✓ Presentation tailored to audience
    - ✓ Professional rapport
    - ✓ Ability to read audience's emotional reaction and respond appropriately
    - ✓ Rate of speech
    - ✓ Use of filler words
    - ✓ Quality of nonverbal communication (in-person)
    - ✓ Established clear next steps and action items
    - ✓ Persuasiveness
- [ ] Comparison of KPI's with corresponding skills/parameters over time
    - ✓ Has the learner been improving on parameter X over time?
    - ✓ How has that impacted his/her KPI that directly corresponds to the skillset?

About Us

MindTickle offers the industry's most comprehensive sales readiness solution for closing the knowledge and skill gaps found in customer-facing teams. Organizations across a wide range of industries use MindTickle's award-winning platform to train, coach, and align their teams to make end-users and their managers more effective.

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