



Optimizing Your Lab's Sales Force Performance

Part 1

Developmental Sales Coaching

By Peter T. Francis

Introduction

The research is indisputable. Great coaching is the cornerstone of creating world-class sales representatives. Even people like Robert DeNiro, Roger Federer, Tiger Woods and Bill Gates — they are all superstars in their respective fields, and they all have professional coaches. Irrespective if the person is a performer, athlete, business man — whatever profession — top people in any industry are continuously trying to improve their skills, and they don't do it on their own. If great coaching is such a critical component of success, why is it so largely ignored for enhancing sales effectiveness? Only a select few sales organizations are willing to make coaching part of their DNA because they *get* the importance of it. *Without* sales coaching, sales reps struggle to remain competitive and win the battle. It's that simple.

The Problem with Managing

Many commercial labs and some hospitals create a job description for a "sales manager" position. The document lists many duties such as monitoring sales numbers, hiring, firing, resolving problems, training, writing performance evaluations and setting goals. There may also be a comment about expectations of field work with direct reports.

Some job descriptions may omit the central aspect of *developing* the sales reps into top-notch marketing people through a process called *coaching*. Managers need to change their skill-set before they can be considered a true coach. It's a natural manager bias to fall squarely into a "let me tell you" model as opposed to an alternative approach in which salespeople analyze and remove their own obstacles. If a manager does not have a defined process that moves their sales people forward so they can achieve greater results, it begs the question: what is the *true* role of the manager? Are they managing the *status quo*? Managing the underachievers? Managing paperwork? Great managers realize that one of their key responsibilities is to maximize the productivity of their team. The consequence of *not* having everyone running on eight cylinders and living up to their potential can be demoralizing and severe: not meeting budget, low morale, and—even worse—employee turnover.

What *is* good sales coaching?

There are two aspects to coaching:

1. **Field coaching:** the manager talks to his representative after the two of them have been on a specific sales/service call — things that went well, things that could have been done or said differently, a review of newly taught sales skills, etc.
2. **Developmental sales coaching:** the manager establishes a specific time to have a sit-down meeting with the sales rep to review obstacles, performance, territory issues, etc.

This article will concentrate on the latter, developmental sales coaching.

Developmental Sales Coaching

Developmental sales coaching is a discipline, a philosophy and a methodology all rolled into one. It is also a commitment to ongoing improvement. It helps sales people recognize and eradicate the obstacles that are impinging on their sales success. It is meant to be proactive and consistent, not a reactive strategy.

Developmental Sales Coaching is characterized in three ways:

1. It employs questions as opposed to giving all of the answers. It helps sales people learn how to analyze their own performance and take responsibility for their development.
2. It focuses on a single concern at a time. This gives the issue the focus it deserves and moves to a quicker resolution.
3. It separates evaluation from development. Each one has its own place, but not at the same time.

Four core responsibilities of a good sales coach:

There are four key tasks of a sales coach. They know how to:

1. Bring out the best in people by supporting and maximizing the rep's strengths—and avoid focusing on weaknesses.
2. Ask the right questions, but may not have all of the answers
3. Provide structure and support so people can begin to self-generate the results they want on their own
4. Request change of behavior, even though it may take time

Coach vs. Boss

When you ask managers what words come to mind when they think of the term, “coach”, they use words like *role model, collaborate, add value, communicate* and *support*. When you ask for synonyms for the word “boss”, they use words such as *control, authority, power, status* and *dictate*. Even the dictionary defines boss as someone who gives orders in a domineering manner, someone who is in control of a group. It stands to reason why people prefer to be *coached* instead of *bossed*.

“But We Don’t Have a Sales Manager”

There are many labs—both private and hospital outreach programs—that do not have a sales manager. This is understandable, as many can’t justify the expense nor see the value in a sales supervisor overseeing one or two field representatives. It is optimal, however, to hire a professional sales manager/coach for a day or two a month to provide coaching for their marketing person. The cost is nominal when compared to a full-time employee, and the results can be significant in terms of sales productivity. Observing rep/client interactions and how a sales rep manages his territory is highly effective for both the field person *and* the organization. If routine, manager-on-site visitations are not feasible, scheduled phone conversations, while not as optimal, can be helpful as a second-tier system.

Five Steps in Developmental Sales Coaching

During a sit-down meeting, it may seem much easier and less time-consuming to tell and/or direct the sales person to do something. But it comes at a cost. It’s a boomerang effect in that sales people who have not had to think through what obstacles are intruding on their performance will turn back to the manager for the answer(s). They don’t have the ownership of the solution or even a sense of commitment to execute it. Therefore, they

are less likely to change. There is an old Chinese proverb that aptly applies: “Tell me and I forget. Show me and I remember. Involve me and I understand.”

The five steps in a developmental sales coaching experience are:

1. Build rapport and set the purpose
2. Compare views of the situation
3. Consider obstacles
4. Remove the obstacles
5. Commit to action

Step 1: Build rapport and set the purpose

By paying attention to the humanistic side of the relationship, the manager can help both himself and the sales rep feel more comfortable for the ensuing dialogue. The supervisor should set the tone that he is there to *help*. Even if the message is a difficult one—failure to meet goals, a complaint from a client about the representative—a supervisor needs to take a moment to create the atmosphere that both individuals will be working together to improve or resolve the situation.

Following this opening rapport-building comment should come a statement about clarifying the purpose of getting together — in a non-judgmental and neutral way. Beginning with, “John, we have a real problem with your sales numbers” is a sure-fire way to create defensiveness on the sales rep’s part. It also sends a message that the supervisor has made up his mind about the situation. These kinds of negative statements do not encourage an open dialogue, and the sales person may feel that the entire discussion is over before it’s begun.

With rapport built and a clear purpose, the manager is ready to move on to **Step 2** — how the sales rep sees and analyzes the situation.

Step 2: Compare Views of the Situation

Just as there are two steps in the first part, there are two components in Step 2: (1) the sales rep's perception of the state of affairs and (2) the manager's view. We all know the old adage, "ladies first." In this case of coaching, the idea is the same — it is always the sales person who talks before the sales manager. If the coach gives his perspective too soon, salespeople will likely defend their actions as opposed to problem-solve.

It is important for the coach to ask questions and then probe further into the answers offered by the sales rep. By doing this, it can help the employee analyze their situation and performance and then consider other options. Because the manager is asking and not telling, it helps build a collaborative approach that eventually leads to the rep buy-in to the action plan.

Following the representative's responses, it's time for the supervisor to offer his opinion of the circumstances. Feedback should be limited to one priority at a time. Start by acknowledging what the sales person has said and reinforcing the strengths, followed by areas of improvement. The more specific the comments, the clearer the picture for the sales rep. It is subsequently important to ask the representative for reaction on what is stated before progressing any further. If there is disagreement between each other's perceptions, the manager should get concordance to identify and deal with the differences.

Step 3: Consider the Obstacles

As the representative and manager compare views on the situation, it's also important to get a two-sided stance of the obstacle(s). Here, again, it is key to maintain the "they talk

first” strategy in this step. Simply ask the sales person to identify the problem: “What do you think is the hindrance to this situation?” The manager must listen, acknowledge and dig deeper until the representative has thought through what is interfering with successful behavior. Multiple questions are especially helpful to assist the situation: “That is one possibility. What do you think is maybe another?” Or, “Why do you feel that way?”

Once the sales rep has analyzed his position about an obstacle, it’s appropriate for the coach to offer his perspective that will reinforce or add value to what the rep said. If the sales person accepts the coach’s ideas, then it’s time to move on to **Step 4**.

Step 4: Remove the Obstacles

After both sides have identified the hurdle, stay on course with keeping the representative responsible to remove it by asking the simple question, “What do you think you can do to change this situation?” This is a critical point, because many inexperienced managers typically move into a directive mode versus a collaborative approach. It may be surprising to hear the creative solutions suggested by the sales person. If the coach is disappointed by a lack of insight or motivation, that, too, is important to understand because it helps guide what areas need attention. The point is, exhaust as many themes as possible about removing obstacles from the representative’s point of view.

Once the sales rep has proposed his ideas, then it’s time for the manager to agree (if it’s appropriate) or, if necessary, to add additional helpful comments. Then check for agreement with the rep.

It’s not always feasible to eliminate *all* of the problems at once. To make a significant improvement in sales performance, frequently all it takes is removing just one issue during a sit-down meeting.

Step 5: Commit to Action

This final step has three components: (1) action step, (2) summarize and (3) encouragement. The sales rep needs to take the responsibility for the action step—not the manager. The question now becomes, “Based on our discussion, what are you thinking of doing at this point?” There needs to be strict clarification as to what the rep is going to do and by when. Suggestions by the representative must be things that are in his direct control and that are appropriate. The manager should stay clear of any obligation. A part of sales coaching is helping sales people believe that *they* are in control of their own results.

It’s important that both the representative *and* the manager agree on the expectations set forth during the discussion. At the conclusion of the meeting, the sales rep should summarize what was decided and by what timeline.

Following this recap, it is important to offer words of encouragement by reinforcing support and confidence. “I know you can do it”, or “I know I can count on you”, or “I’m here if you have questions.” These all translate into confidence for the sales person.

Final Thoughts

Great coaching is undeniably one of the most potent tools to enhance anyone’s capabilities, irrespective of what he/she does for a living. Especially in the area of sales, a fifteen minute coaching session is vital to bring out the best and empower people to do the right thing. The manager guides his sales staff in analyzing their strengths and areas of improvement. He learns where they are stuck, and helps broaden their perspectives so they can see other possibilities.

The premise of coaching is to develop a safe place to co-create new possibilities. A sales manager who has “all of the answers” is the antithesis of great coaching. The coaching model is based on the belief that questions are at the very core of all the coach’s tools and

strategies. Ongoing coaching needs to become part of the sales organization's DNA if the company expects to develop the sales people, optimize their performance and grow the business.

Peter Francis is president of **Clinical Laboratory Sales Training, LLC**, a unique training and development company dedicated to helping laboratories increase their revenues and reputation through prepared, professional and productive representatives. Mr. Francis is a proud member of the Washington G2 Advisory Board to which he has contributed several articles. He has also published articles in industry-related magazines such as **Vantage Point, ADVANCE for Administrators of the Laboratory, ADVANCE for Laboratory Professionals and Medical Laboratory Observer**. Visit the company's web site at www.clinlabsales.com for a complete listing of services.