LevelEleven Coaching Best Practices

The complete guide to sales coaching to empower your reps, enable your front-line managers, and improve team performance.

COACH

noun: coach; plural noun: coaches
instructor, trainer;a tutor who gives private or specialized teaching.

verb: coach
train or instruct (a team or player).
give (someone) extra or private teaching.
prompt or urge (someone) with instructions.

synonyms: instruct, teach, tutor, school, educate, upskill, guide, drill, prime, cram, put someone through their paces; train

Setting a goal is not the main thing. It is deciding how you will go about achieving it and staying with that plan.

Tom Landry, Original Coach of the Dallas Cowboys, 29 seasons

Contents

Who Should You Be Coaching?

Studies have shown that as a manager you should be focusing on the middle 60% of your performers. Most managers focus on the top and bottom 20% of their performers even though the return on your time invested is minimal compared to the middle 60%.

HOW LEVELELEVEN COACHING WORKS

We have empowered leaders with tools to motivate behavior, track leading indicators, and recognize achievement. You need structured onboarding and coaching to make your team better and accelerate improvement.

LevelEleven allows you to coach reps 1-on-1, customize your questions so the team knows where to keep their focus, and help team members improve. We also empower team members to take part in the coaching process by requesting help with specific items, completing their portion of the coaching note ahead of time, and more. This brings more structure to the coaching sessions and makes them more productive for everyone.

Before you begin Coaching using LevelEleven, ask yourself these questions:

1. How do I coach my people now?

2. What types of coaching do we need? For example, call shadowing, deal reviews, 1-on-1s, etc.

3. How frequently am I going to meet with my team?

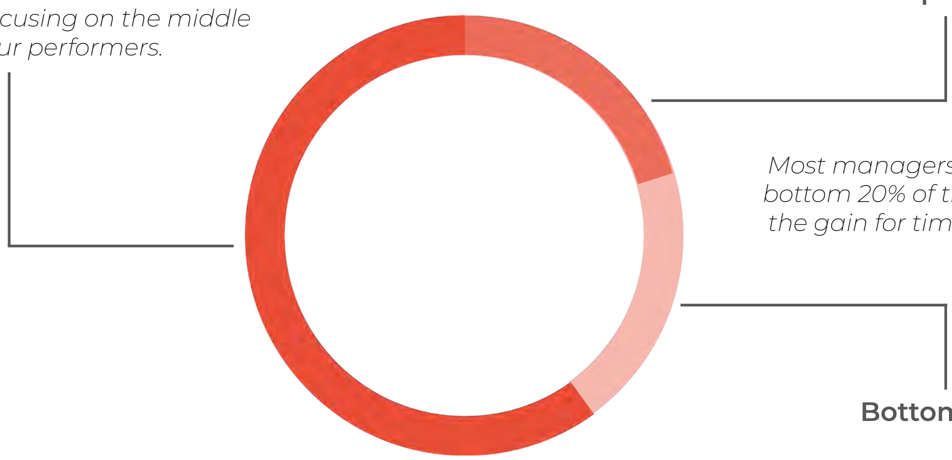
4. Who on my team would benefit from coaching the most?

5. What are the most important parts of our process that lead to results?

6. What did I do as a salesperson that made me successful?

7. How are my people motivated?

Who to Coach?



A FEW IDEAS ABOUT COACHING

Not all coaching sessions are created equal. Here at LevelEleven, we are passionate about making your managers better coaches. Use these simple steps to help you organize your session and set yourself up for success.

ASK DETAILED QUESTIONS

It is important that questions are detailed so the answers have a better likelihood of being detailed. For example, a vague question like, "How is it going?" will warrant a vague answer like, "fine."

CREATE TEMPLATES

Create templates for each type of coaching session you would like to conduct. If you want to have a call shadowing discussion, then create a template with questions related to that, and don't bother discussing the Scorecard. Alternatively, if you want to have a weekly 1-on-1, include all coaching sections and write questions that cover all topics of team member contributions.

PERSONALIZE

Make your coaching personable, and try to relate to who you're coaching: Talk to them about the similar situations you have been in professionally and how you've improved.

> ***Coaching is unlocking a persons potential to maximize their own performance. It is helping them to learn rather than teaching them.***
>
> *- Timothy Gallwey , Author of The Inner Game*

TEMPLATE IDEAS

Using coaching templates within LevelEleven is a great way to standardize your coaching. We will go into the following template ideas in depth to help you build the most helpful coaching templates.

- *1-on-1 Weekly or bi-weekly*
- *Call Coaching*
- *Onboarding Templates*
- *Quarterly/Annual Review*
- *Opportunity Progression*
- *Pipeline Review*
- *Skill Development*
- *Performance Improvement Plan (PIP)*

SAMPLE STARTER QUESTIONS

Now you know the importance of coaching and have an idea of what types of sessions you should be regularly holding. Throughout the rest of this eBook, we will be giving you example questions for each type of coaching listed above. Use these as a guide to build a template that works for your organization and team.

GENERAL 1-ON-1s - weekly meetings with individuals

- *Where have you found success this week/month?*
- *What activities are you getting hung up on? Why are these difficult?*
- *How would you rate your performance over the past period?*
- *Do you feel accomplished when you leave each day?*
- *If there was one skill you could instantly obtain, what would it be?*
- *What are the 5 most important opportunities that you currently have open?*
- *Why do you think you produced the results you did over the last period?*
- *What can I do to help you perform better? (Resources needed?)*
- *What is your biggest weakness as a performer in your position? How will you improve this?*
- *What are you willing to commit to changing to improve?*
- *What parts of your process do you think aren't working?*
- *What have you learned from the past period? What will you do differently with this knowledge?*
- *What was your single biggest success over the past period?*
- *What's one thing you want to start doing? One thing you'd like to stop doing?*
- *Why do you think that closed? How could you have improved? How long was the sales cycle?*
- *Last closed lost - what happened? How could you have improved?*
- *Top performers - what do you do that is different from your peers that impacts your performance?*
- *Bottom performers - what do you think your peers are doing that you should be doing?*
- *Middle performers - what are you doing that is most important, what do you want to learn?*
- *Closing question - what can I help you with between now and the next time we meet?*

TACTICAL APPROACH

This allows you to get in the weeds with your team members in order to really help them advance specific parts of their job or opportunities they may be working. Reference your experiences as a sales rep to coach your team through the more tactical parts of the job.

CALL SHADOWING

- *What would you change about this call?*
- *What did you do well on this call?*
- *What would you rate yourself on this call? (Scale of 1-5)*
- *What kind of research would you do in advance before we go in front of the customer again?*
- *Do you feel that you had the proper training to succeed on this call? What training do you need?*
- *Did you prepare for the call? How did you prepare for this call?*
- *What is the biggest opportunity to improve on this call?*
- *What has changed since the last call review? What improvements have been made?*
- *How did it go. What do you think went well, what didn't?*
- *What would you do differently?*
- *What were you thinking when the customer got confused, or when they brought up an objection?*

DEAL REVIEW (GENERAL)

- *What were the key takeaways from your last Closed Won Opp? What did you do right?*
- *For Opps that you won, did your communications start off positive? If yes, why , if no, what changed?*
- *Have you identified the key stakeholders at these opportunities?*
- *Where do you get most hung up when trying to progress deals?*
- *What is your hottest deal right now and how can we get it closed won this month?*
- *Do you need specific coaching on one aspect of your hottest deal?*

PHASES OF AN OPPORTUNITY

No matter what organization you're at, it's important to conduct coaching session at different stages of an opportunity. Use these questions to help your reps get their deals through the funnel.

DISCOVERY

- *What is the problem we are trying to solve for the prospect?*
- *How do you think we can solve their problems?*

PIPELINE REVIEW

- *What are the most important opportunities in your pipeline over the next 60 days?*
- *What percentage of the business in your pipeline do you think is closable?*
- *How often do you update and clean your pipeline?*
- *What help do you need to bring in your most important deals?*
- *What have you done in the past to be successful that you can apply to these deals?*
- *How would you rate your effort towards increasing your pipeline? (Prospecting based questions)*
- *Do you think your pipeline is sufficient to work off of if new opportunities suddenly became scarce?*

REVIEWS AND ONBOARDING

Whether you are onboarding a new employee or doing yearly or quarterly reviews, it's important to come into the session with prepared questions and discussion points. Send the questions to your reps beforehand so they can come to the session prepared as well.

QUARTERLY/ANNUAL REVIEWS

- *How would you rate your effort over the past period?*
- *How do you feel you have developed over the past period?*
- *What would you change about the past period?*
- *What will you do differently over the next period?*
- *What is your biggest win over the past period? Why?*
- *What is your biggest loss over the past period? Why?*
- *What were your goals for the past period? Did you achieve them?*
- *What will your goals be for the upcoming period?*

ONBOARDING

- *What is the most valuable thing that you learned over the past period?*
- *Did you have a significant moment over the past period where you feel you learned the most?*
- *Over the last period what do you feel you have the most room for improvement?*
- *What will you change over the next period to make sure you are learning efficiently?*
- *What can I do to help you?*
- *What additional training would help you the most?*
- *What would you improve in the onboarding process? (Day 80+ Cap Question)*
- *Do you feel comfortable/well adjusted to the office environment?*

HOW TO COACH REMOTE TEAMS

With a rising number of teams working remotely due to the Coronavirus situation, we wanted to share some ideas on how best to navigate this "new normal" without missing a beat. We are confident that these tips will continue to help you even after the sequester period has ended and we are back to "business as usual".

STAY ENGAGED WITH YOUR TEAM

- *Leverage/develop a scorecard to quickly determine if your team is staying on track with their activity and performance goals*
- *Reps should have visibility into their personal scorecards*
- *Managers should be able to use a summary version to quickly identify areas for coaching*
- *Managers should NOT use this as a way to micromanage your remote team*
- Pro Tip: *the best Scorecards will provide real-time access to performance data from your CRM*

BEST PRACTICES FOR REMOTE COACHING SESSIONS

- *Come prepared with snapshots of historical performance compared to how the team member is performing today*
- *Ideally the rep and manager should both complete a brief template prior to the discussion to help guide the conversation*
- *Empower your team to request coaching in a streamlined and effective manner*
- *Update your coaching templates/cadences to check on your team's mental wellbeing while working remotely*
- *Turn on the camera! Video conversations help to reduce miscommunication*
- Pro Tip: *the best coaching cadences we have seen are when the rep receives an automatic reminder to complete their section prior to the 1-on-1*

NOT ALL COACHING SESSIONS ARE CREATED EQUAL

Here at LevelEleven we are passionate about helping our customers make their coaching sessions as productive as possible. Use the simple steps found here to help you organize your session and set yourself up for success.

FOR MORE INFORMATION ON COACHING BEST PRACTICES:

- *Download a copy of our* 7 Coaching Best Practices
- *Check out additional* Coaching and Leadership resources *on our website.*
- *LevelEleven customers can always contact their Customer Success Manager or email us at* gethelp@leveleleven.com