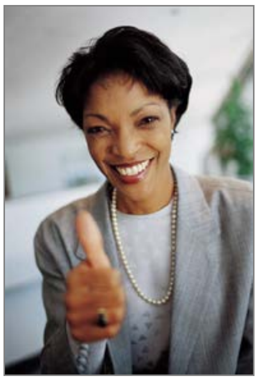
Field (Observation) Coaching

Overview



First- and second-level sales managers learn to focus, plan, and lead more effective observations and conversations to improve field coaching, sales behaviors, and sales process**.** **Field (Observation) Coaching** adds power to any sales training program you may now be using.

PROGRAM PURPOSES:

Increase Field Coaching Energy, Efficiency, and Effectiveness

Field (Observation) Coaching and its implementation are designed to:

- Develop internal agreement about coaching standards: frequency, purposes, and quality.
- Help managers determine who they will coach, at which points, and for what purposes.
- Increase the leverage from time invested in coaching by:
  - Structuring the conversation more clearly.
  - Increasing emphasis on focus and preparation before a coaching observation call.
  - Streamlining the discussion following an observation to help both coach and performer get to the key points quickly and reduce the "sting" feedback can sometimes produce.
  - Ensuring that there are clear, measurable action plans following a post-call discussion and a tracking mechanism to ensure that the coach revisits the coached skills at a subsequent date.

Learning Activities – Preparation, Kick-Off, Classroom

PREPARATION

The bank determines or confirms its sales management practices and expectations, particularly its expectations for field observation coaching (how much of what type of coaching per month) PLUS **quality standards** for field coaching (what does "well done" look like for coaches).

KICK-OFF

Senior managers meet to:

- Confirm the bank's expectations for field coaching.
- Confirm the integration of field coaching into their direct reports' sales management jobs. (Main goal: Reduce the number of managers who don't have time to invest in field coaching activities.)
- Make commitments and set calendar dates for observing and coaching their direct-report sales managers' field coaching activities.
- Learn the elements of the coaching model they'll be observing and coaching.

Clarity Advantage Corporation is a sales acceleration consulting firm. We help companies accelerate sales by focusing value propositions, improving sales processes, and boosting sales manager effectiveness.

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Senior managers then meet with their direct reports, individually, to communicate and discuss the field coaching expectations—focus, frequency, and quality—and to discuss the method and extent to which the senior managers will observe and coach their sales manager direct reports on their field coaching. They also introduce the **Field (Observation) Coaching** training program to their direct reports and, through discussion, agree with their direct reports on the specific points in the training that are the most important for the direct report sales managers.

PRE-CLASSROOM WORK

Participants complete pre-classroom work including discussion with their managers and brief readings about coaching. (Clarity suggests articles based on the bank's current state of coaching practice.)

CLASSROOM DAY 1

During the first-day classroom session, participants complete a series of small group learning activities and discussions:

- Principles of field observation coaching
- What "good" looks like
  - Review the skills and quality standards to which coaches will coach
  - Review the bank's quality expectations for coaching
- Managing time and productivity: Determining who you observe and when you observe them
- The Coaching Conversation model and steps—Prepare, Observe, Review, Plan Action
- How managers and sellers prepare (individually and together) for an observation coaching call (includes assessment of an audio-taped preparation conversation
- How to observe on an observation coaching call (includes role play)
- How and when to lead a coaching conversation after an observation (includes role play)
- Determining and executing a post-observation improvement plan
- Practice—Three rounds of role plays covering the Prepare, Review, and Plan Action steps
- Action Planning

CLASSROOM DAY 2

Participants begin the day with a quick review of the Day 1 material. They are then subdivided into groups of three or six participants, to each of which is assigned a coach/trainer. Participants are given information about a seller and an upcoming observation coaching call.

Each of the smaller groups moves to a breakout room equipped with either a video camera or a tape recorder for feedback sessions covering the Prepare, Review, and Action Plan steps. In each case, participants role play the conversation with a partner (another participant).

Review the audio or video tapes, and offer suggestions to each other, supported by the coach/trainer.

Support Tools

The support tools include:

- "Quality" criteria for sales skills and coaching skills ("What Good Looks Like")
- Call preparation worksheets for seller and coach
- Call observation worksheet for coach
- Call Review and Plan Action worksheet for seller and coach
- Field Coach Planning Worksheet (to support decisions about who to coach, when, and on what

Variations

Following the course, we can set up "remote role play" coaching of managers by telephone, in which they role play with a Clarity coach or colleague, then receive coaching from Clarity following the role play. We also offer individual coaching for coaches—a "hot line" the coach can call for help with real coaching situations.