

TRAINING, COACHING, AND COUNSELING: WHEN AND HOW TO APPLY EACH

The topics in this chapter are all paramount to the sales manager's career. In fact, similar to communication skills and motivation, these skills are applicable to any position in management, so they will benefit you as you advance up the management ranks. It is also important to realize that while certain theories, skills, and techniques apply specifically to training, coaching, or counseling, there is also a great deal of crossover. You will find that right off the bat you are charged with some of each, depending on the person and the circumstances.

You will begin by looking at the area of training, which then directly ties in to coaching. Then we'll cover the topic of counseling and special circumstances including legal issues.

METHODS OF TRAINING BASED ON LEARNING STYLES

Every one of us has the ability to acquire information, store information, and call on that knowledge at any time. This ability is generated by a combination of factors unique to each of us. In the past, many teachers and trainers had limited their instruction to a

traditional method of telling you something and hoping that you then absorbed that information.

Today, training is a far cry from that old method. The days of sitting in long lectures are being replaced by an array of new adult learning techniques. Before delving into core training methods, it is important to understand how we learn.

The Four Levels of Awareness

The way we learn is a process of four stages: unconscious incompetent, conscious incompetent, conscious competent, and unconscious competent.

Unconscious Incompetent

This is when someone does not know that a particular behavior, piece of knowledge, or skill exists. For example, a child too young to write may not be aware that the writing skill, exists. You might not have the skill nor be aware of it, or it is possible that you might just deny its importance or usefulness.

Conscious Incompetent

This is when someone realizes that he does not possess a specific skill set. This person might then decide to seek out this knowledge or not. Assuming it is a necessary skill you will hopefully be inclined to learn the skill to improve yourself.

Conscious Competent

This is when someone knows a particular skill, but must think about that skill in order to accomplish the behavior or activity. She might not require assistance, but more repetition and practice are still necessary to fully develop the skill. This is often a difficult level to fully surpass, as certain skills require a great deal of time to master.

Unconscious Competent

This is when a person does not stop to think about a particular skill. She is able to do it automatically. It is what is often called “second nature.” She may not even realize that she is doing it nor how to explain it to others.

Each of these levels could pertain to any one of us at any given time, depending on the circumstances. At the same time you could

be at the unconscious competence level and then a particular related skill is brought into the picture and throws you back a stage or two. As a new manager, you are learning certain skills that you did not even know existed, as well as handling tasks and accomplishing certain things with ease. While the topic of training is primarily about improving the skills of your staff, you must first understand the basic training methods, and how and when to apply them. It is also your responsibility to continually move your staff forward in the learning stages.

Multiple Learning Styles

The human brain has a tremendous capacity to multitask. Therefore, we are able to learn and be at different levels of awareness for different things all at the same time. The ways that we get people to learn will vary, and there are a plethora of tools to make this happen. Today, the emphasis is on the receiver of the information or a learner-focused environment.

Learner intake can be done via stimulus impacting any of the five senses (hearing, feeling, sight, smell, taste).

The three traditional learner intake styles are depicted in Figure 7-1:

Auditory

Kinesthetic

Visual

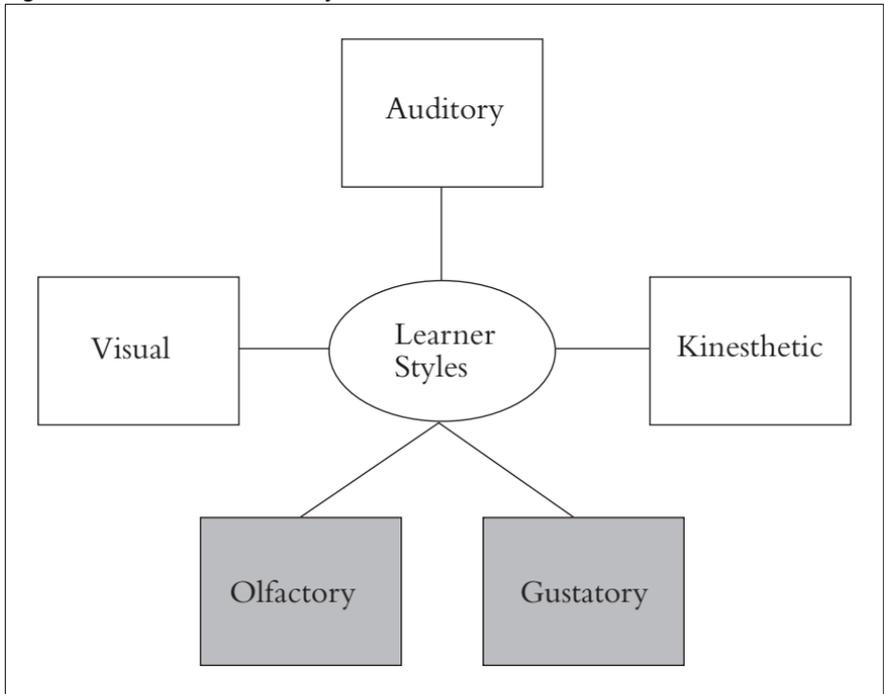
The other two—olfactory (smell) and gustatory (taste)—are not as important in the types of training you will be involved in.

As it relates to the primary styles, some learn by using auditory skills that enable them to process information that is heard. Others like being part of the experience, feeling, touching, or working with a product or service. Still others prefer to use their sight to process information being provided to them. Of course, we all can learn by using a combination, but typically one style of learning is most suited to us and provides the best environment for us to learn.

Auditory

Auditory learners gain knowledge through hearing. The interpersonal intelligence is extremely important since auditory learners like to have someone “talk them through it.” They prefer listening to a

Figure 7-1. Different learner styles.



tape instead of reading a book. The auditory learner will remember what is said over what was seen.

Auditory learners might expose their style by frequently saying things like “I am listening to you” or “That sounds good.”

Ways to help train the Auditory:

- Converse with him often.
- Give presentations (more lecture style).
- Allow time for Q&A after a presentation.
- Ensure a conducive setting for open discussions and dialogue.
- Provide tapes or videos whenever possible.

Kinesthetic

Kinesthetic learners are sometimes called tactile or physical learners. They absorb information through moving, doing, and touching. Kinesthetic learners will think best as they are pacing. They have a tendency to gesture frequently or have exaggerated facial expres-

sions during conversations. Kinesthetic learners can remember subjects or locations best when they have had a lot of involvement with the subject and spent time at the subject's location. For example, the kinesthetic learner would tend to be field-dependent. They prefer to learn in the contextual environment. Field trips, hands-on experiments, and real-life applications are most important. Kinesthetic learners want to try it first, then read about what they just did. Textbooks and lectures are of limited value.

They might express their preferred style by asking to participate in a demonstration.

Ways to help train the Kinesthetic:

- Paint mental pictures.
- Use metaphors.
- Show videotaped demonstrations of a subject.
- Observe or participate in role-playing.
- Allow them to work on flipcharts.
- Ask them to imitate or practice something.

Visual

The visual learner processes information through seeing. Visuals like to follow the pictures and read the directions. They prefer art to music. They might memorize through visual associations. The visual learners tend to accept things for how they look. They may buy something based on how it looks, even if they don't fully understand its applications. Visual learners can learn in a flexible environment. Noise is usually not a distraction. The exception to their flexibility is someone in their space or blocking their view.

Employees might offer clues as to their learning style by looking for more descriptive examples of the subject matter being presented.

Ways to help train the Visual:

- Use colorful and visually appealing presentations.
- Handouts and overheads are desirable.
- Provide charts, learning maps, posters, etc.
- Have them take notes on a subject being taught (the act of writing it down can be useful).

The objective is to expose the new salesperson to as many of the techniques as possible to ensure that what you are training is compatible with the salesperson's learning style. You can also look for other clues in advance from the salesperson as well. For example, the better presenters and public speakers on your team will tend to be more auditory learners. And those that tend to explain things to others by allowing them to fully participate in the learning are likely more kinesthetic themselves.

It is also helpful to think in terms of personal styles (DISC) when training. For example, if the employee is a High "C" (Contemplative), it will be best to train him using concise, detailed data, attempting to fill in all of the pieces of the puzzle. A High "D" (Directive) might be more impatient and just want the core information, not all of the explanation around it.

Furthermore, some prefer a slower pace, allowing for more time to absorb all of the information; moving too fast could overwhelm them. Also, keep in mind that within each style of learning there are those who prefer to work independently and those who prefer to learn more in a group setting. Therefore, it is always good to mix up the amount of interaction (i.e., individual learning, group in pairs, team learning, and so on).

Also, don't forget one of the best but most often underutilized ways of discovering a preferred style—to ask! We have all been trained over the years, and many of us already know what style we prefer, at what pace we like to learn, and in what type of setting, so why fight it? If you are already training someone on something that is potentially a weakness, why make it that much more difficult? It can only lead to more frustration on the part of the learner.

With this knowledge, it is up to you to try to work into your sales training various methods of the three learner intakes, deciding when and with whom to provide these different approaches—sight (visual), sound (auditory), or more hands-on (kinesthetic).

THE CORE CONCEPTS OF REINFORCEMENT

Now that you have some basis for how people learn best, it is important to couple this with behaviors that promote and support the training. Behaviorist B.F. Skinner (1904–1990) was a pioneer in the subject of reinforcement, and his theories form the basis of much of the work and techniques used today.

Reinforcer. Any stimulus affecting the individual that he seeks to experience.

Aversive Stimulus. Any stimulus affecting the individual that she seeks to avoid.

In the work setting, for most people, reinforcers and aversive stimuli usually come from the behavior of other people. Examples of this are as follows:

Reinforcer

Praise
Recognition
Attention
Being liked
Understanding

Aversive Stimuli

Inconsiderate treatment
Reprimands
Being ignored
Being mocked
Criticism

Also, what may be reinforcing to some people may indeed be an aversive stimulus to another. For example, as you recall from the topic of motivation, some people enjoy a great deal of public recognition. However, some find that type of recognition embarrassing.

Supervision is another example. Oversupervision on a project may demoralize the individual attempting to complete a certain task. Remember some of those traits of a micromanager? On the other hand, there are those that prefer a certain amount of supervision, and it could be an aversive stimulus if they are not being paid attention to.

Pairing

Any stimulus can become a reinforcer or aversive stimulus through pairing. By this we mean that something like praising can become aversive by pairing it with criticism. For example, “That was a good job you did creating that sales proposal, Fred, but why did it take so long to get the printing done?”

As a manager, it is up to you to get to the bottom of what is affecting your salespeople, both negatively and positively. You may find that a salesperson has been avoiding a certain customer because that customer is aversive to the salesperson. Recognizing that information about the salesperson could help you think of certain areas of training that will hopefully offset the avoidance behavior.

For example, it could be that the person is always trying to present new products when a needs analysis has not even taken place yet, and this is turning the customer off. In this case, more training on how to probe and ask discovery questions to get to the customer's pain points might be helpful, and then the presentation can follow.

You could also find that just by getting more involved with the salesperson and understanding his challenges, you are providing reinforcing stimuli.

Therefore, it is important to recognize on an individual basis what is reinforcing and what is aversive to that individual. Attention must be focused on the individual's action or reaction to any outside influences that seem to be affecting her in a reinforcing or aversive manner.

Principles of Reinforcement

Any response followed by a reinforcer has a higher probability of occurrence in the future.

This means that it is important to catch people doing things right and then recognizing that activity. When recognizing people for doing things right, be specific in describing the correct behavior. Tell them exactly what they did right and why it was right. Conversely to what some novice managers think, encouraging employees and telling them what a good job they did will not make them lazy or overconfident but rather sets the stage for them to continue with the positive behavior.

However, a negative action can also be reinforced. For example, consider the person in a meeting who complains about everything. That person is usually reinforced by attention. When you allow that person to dominate the floor or constantly recognize her, you have reinforced the complaining, and the behavior will continue. One option here is to just ignore it. Of course, a deeper behavioral issue might need to be addressed directly with her in a more appropriate setting. We discuss this in greater detail later in the section "Coaching and Counseling."

Any response not followed by a reinforcer has a lower probability of occurrence in the future.

Assume, for a moment, that a certain salesperson has excellent presentation skills. When observing him making sales presentations,

the manager forms a positive impression but for whatever reason says nothing about the positive behavior (as in complimenting or congratulating him on a job well done). After a while, there will probably be a slight drop in the efficiency of that salesperson's presentation skills. This could be because the salesperson feels that either his presentation skills are not important or his skills are not actually very good. Neither assumption by the salesperson is accurate, but could, unfortunately, be the end result. Again, holding back on praise is not the answer.

Any behavior followed by an aversive stimulus has a lower probability of occurrence in the future.

In one example, a salesperson who complains constantly about other employees can be told that talking about others behind their backs is not constructive, and, in turn, he takes on a more positive outlook. Another example would be ideas that are given to management that are completely ignored, which could reduce the odds of additional new ideas being presented—two completely different stimuli, the latter of course being a result that was not intended.

To decrease the probability of a behavior controlled by a reinforcer, pair the reinforced behavior with an aversive stimulus.

Let's return to the example whereby a salesperson likes to be center stage because he finds recognition in meetings reinforcing. On a one-on-one basis, the person is told that other people in the group find this to be disruptive and unproductive and that if he continues in this fashion that he will not be included in future meetings.

An aversive stimulus (taking away recognition) was paired to what that person considered a reinforcer (attention in meetings, even though the attention was negative). In turn, that threat of no attention at all will decrease the probability of the disruptive behavior occurring in the future.

Now consider the salesperson who reaches 150 percent of his quota only to be told that the quota "must have been too soft." The odds of that salesperson reaching this high a percentage of his quota again will be reduced. Here the unintended result could be taking away some of the motivation or foundation previously built up.

To decrease the response controlled by an aversive stimulus, pair that aversive stimulus with a reinforcer.

Because many managers have been programmed to catch people doing things wrong, those managers have a tendency to become an aversive stimulus to the salespeople. In order to provide reinforcing

stimulus to these people, managers must focus their attention on reinforcing behaviors. Again, the simplest way to do this is to not only catch people doing things right, but also by make it known at the right moment.

Here it is important to note that timing of the response (or lack of a response) is critical to reinforcement theory. As you know, something can lose its affect with the passing of time. For example, when you find that your salesperson has just done something well, it is better to commend her right after the occurrence as opposed to waiting some time. Also, not just the length of time, but the amount of times, can affect this as well. Reinforcing someone one time and then not doing so on subsequent instances can turn into an aversive stimuli.

Giving feedback or criticism is one of the more challenging areas for a manager. However, keep in mind that when criticism is presented in what is perceived to be a positive way, it can actually become constructive and productive.

Take the following example:

Manager: On that last call, you positioned the third benefit in a negative way. If you reword your approach, it will be even more effective. I know you can do that because the rest of the presentation was done very well.

Similar to this, remember that you hold the keys to turning around a negative sentiment and making it something more positive. For example:

Salesperson: Boy, I really messed up that contract with the XYZ account.

Manager: Do you mean the XYZ account in New York? I think they've kept up business well with us, even with the price increases we were forced to pass on to them due to our rising costs in raw materials.

The Problems with Using Aversive Stimuli

- When people constantly pair themselves with aversive stimuli, they eventually become aversive by reputation.

- Employees withhold information from aversive managers.
- Using aversive stimuli to reduce the probability of an undesirable behavior does not necessarily increase the probability of desirable behavior.

As managers and leaders, it is vital to utilize the correct reinforcers at every possible opportunity. Again, pay attention to when your staff is doing things right, and reinforce that positive behavior. Positive reinforcement can help to improve the environment for the individual to be motivated from within.

Reinforcement in Training

The rule when training new salespeople is simple: Always use positive reinforcement on positive behaviors. Looking at it another way, never think of punishing someone for something they do not know how to do. Even when making corrections, always finish with a positive. This gets the salesperson focused on making the correction instead of dwelling on your feedback. In the long run, a series of small positives will add up to a larger positive, and the result will be better performance.

THE DEVELOPMENT OF WINNERS

Training sometimes appears to be more complicated than what it really is. In fact, training follows a very basic cycle. The objective is always to get to a specific goal of development.

The Training Cycle

Tell: The first part of the cycle is to tell the individual what should be done and what will be expected, based on a specific standard of performance.

Show: Demonstrate the procedure or process to them.

Try: After the demonstration, allow the trainee to try the procedure while being observed.

Evaluate: While observing performance to evaluate what was learned, focus on functionality and not personality. Evaluate based on the goals.

Correct: Get the trainee's opinion of the performance. If the trainee did not perform properly but knows it, learning has still taken place. Practice will now improve performance.

Keep in mind that the norm is to start with "Tell." If, however, there is uncertainty as to the trainee's capabilities, it is best to start with "Try."

For example, if a person goes to a golf instructor to take golf lessons, one of the first things the instructor will do is to ask the person to hit a few balls on the driving range. Once the instructor has observed and evaluated the person, she can now correct, and the cycle continues.

The New Team Member

Rarely is any direct stair-step approach or system found in dealing with human behavior. Developing winners will still follow a very distinct pattern. Some people will move faster than others, but all go through certain phases.

Of course, a new hire will have his own distinct challenges, which could include the following:

- Learning about the products/services
- Learning about the organization
- Getting to know his colleagues
- Learning about and getting to know the customers
- Learning about the competition
- Learning new systems (CRM, Sales Force Management software, etc.)
- Understanding the business processes and working relationships
- Other

This is a time to really step up as a manager and get involved to make a new hire's training and acclimation to the work environment as smooth as possible. A few suggestions would be:

- Have a plan for her (first day, week, month, quarter, etc.). This doesn't have to necessarily cover all the details of her job, but it should hit most of the core areas.

- **Networking.** Let him get to know the people he is going to work closest with in a stress-free environment. No need to have someone start in a “trial by fire” atmosphere if it is not necessary. Again, training is tough enough for most people.
- **Rotate her** about the core departments. If at all possible, let her spend some of those first few weeks meeting and talking about the roles, responsibilities, and challenges in other departments.
- **Give him time.** While you might operate in a very aggressive sales atmosphere, realize that some people are ready to pound the pavement on day one and others need more time to grasp things. That does not necessarily mean the latter has less potential; it could be just the opposite.

Your Existing Team Players

It is time to look at the level of competency and skills of each individual salesperson. This is where many managers categorize their staff as A, B, and C players (or something similarly straightforward). In a perfect world you would have a team of all A's. However, as you probably realize, that is not the case. You likely have a staff that fits into a classic type of curve:

A Players—Low Percentage

B Players—High Percentage

C Players—Low Percentage

If your systems are properly in place (especially the sales and comp plan), it should be easy to identify where your team members fall. If not, your job is a bit more challenging. However, you still have the ability and insights to identify those who shine in the field and those who seem to be setting everyone back.

Whatever the percentage of each (A, B, C breakdown), the task is the same, to maximize overall productivity. So the critical question is: Where do you spend your time?

If you think back to the basics of time management and prioritizing, it seems intuitive that you would want to focus on the A tasks (then B and, only if time permits, C). This same idea holds true for training your team, with certain exceptions. Another way to think of this is like the 80/20 rule in account management. With

your team, you can easily fall into the trap of spending 80 percent of your time with the players that show the least upside potential. Meaning, the incremental gain to focusing on C players is often minimal, whereas the gain by enhanced training of the A ones could be exponential.

The following are some of the common reasons why new managers spend too much time with the C's:

- Productivity is down with the C's.
- The C's are always at your door.
- The A's are rarely at your door.
- The star players intimidate you.
- If it isn't broke, don't fix it (A's).
- Poor time management.

All of these reasons in a way lend themselves to why you should spend *more* time with your stars and less with those that are tying up all of your time with little gain. Now that you have some tools in place to better manage your time and ways to increase motivation in your team, it is time to focus your attention on those who will benefit you the most. Sure, training your best producer might seem awkward at first, and you will likely get some resistance, but it could be more advantageous than focusing on all those C players combined. Here is an example the typical A verses C upside potential.

<i>Revenues/Past 3 Years</i>	<i>3 Years Ago</i>	<i>2 Years Ago</i>	<i>1 Year Ago</i>	<i>This Year</i>
Top	1,350,000	1,300,000	1,275,000	1,400,000
C Producers	1,000,000	975,000	1,110,000	1,220,000

In this not so uncommon example, by providing the right training to your star, you have increased her sales by 10 percent. While working with the few C players you manage, sure you have also increased sales by 10 percent, but it took up a significantly greater piece of your time compared to working on maybe one or two extra skill enhancements your star player was missing. Also, you will notice in this scenario that the top producers' performance (or at least revenues) was deteriorating slightly year over year. This could relate back to the reinforcement examples discussed; a lack of the

right stimuli under the right circumstances will only set them back. Even someone who by all appearances wants to be left alone has internal motivators that can be tapped into and deficiencies in certain skills.

One particular situation you might find is that your A players give off the impression that they are very engaged and eager to learn and participate. While this might be the case, it can actually be a smokescreen. For example, they might be eager to communicate with you and others and flex their own muscles or brag about their successes. Their confidence can put a new manager on the defensive, feeling uncomfortable approaching them for training. Well, you will at some point need to approach these top performers, similar to colleagues who have been your friends. And just like in these other unique situations, if you do so in as objective a manner as possible, focusing on goals (theirs, yours, and the organization's), you will be able to make these breakthroughs.

Now for an important caveat. While there are certainly those A's who deserve your attention, there are going to be B's and even some C's that have a great deal of upside potential as well. This is where your job can get even more intricate, identifying the right internal motivators and types of training necessary and then getting a sense of how valuable this could prove to be.

This is where you need to be sure to identify all the strengths and weaknesses of each of your team members. You can then conduct a gap analysis and see where your most likely benefits can come from. For example, if you determine a weakness in a solid B performer getting referrals, you can determine how far off he is from really grasping this art and then map out the appropriate training to get him there. Or if more praise or recognition is what a C player needs, you might find that this alone can dramatically change her eagerness to perform. The golden rule—like they say about picking stocks in the market, “the upside gains need to outweigh the downside potential.” As you can imagine, an eager salesperson is still just a starting point. In order to take her to the next level, she needs skills, and training is the way to make this happen. Also, keep in mind that you can train in many areas, but the primary ones that will impact performance relate back to those skills that make up the exceptional sales professional—communication skills, business acumen, technical knowledge, and market experience.

Through your efforts, a salesperson needs to possess two things:

- The necessary skills and knowledge (four categories)
- A motivational foundation that will drive her forward

If she is low in both, she will of course require more guidance in both.

If she is high in one—say, skills and knowledge—but the motivational factors are not there, then you will need to work on the environmental ones.

If he has the motivational factors but not the skills and knowledge, then of course you will need to work on the latter. However, keep in mind that, as we have been discussing, they can both go very much hand in hand. For example, how can you expect someone to be eager to receive more training when he is demotivated? Also, as you have seen, it does not have to be a broad-based motivational issue, but rather one that touches on a particular area that is posing a challenge to the salesperson. In this case, be careful not to push too hard in that area, as the problem could get worse.

This is a very difficult level of learning, especially for a new hire. An extreme example is when responsibility after responsibility seem to compound themselves, and then the realization strikes that the job or position is far more complicated than originally thought. All the information that has been given during the earlier learning phases has now become scrambled. The employee's confidence level drops. He questions his own ability to handle what he thought looked very attainable in the interview.

This is when you need to slow down the information flow while at the same time building esteem and self-assurance.

One useful way to build up confidence without overwhelming the salesperson is to get her more involved in the decision making. If the salesperson can do just a small piece of a project or new task well, let her do it. While something may seem insignificant to you, it could actually be significant to the trainee.

For example, if an important report is due immediately, let the trainee help with the design. Although the content of that report may be significant, the design or outline (although an integral part) is probably not as significant. Even if the salesperson's input into the design is small, if it is remotely close to something you can use, you should consider it. This will allow him to feel part of the report and

at the same time have his confidence bolstered by your willingness to give him credit.

The trainee will be able to learn about the report more quickly because he is involved and because he feels appreciated and that his input is valued.

Also, how a salesperson responds to a particular activity is typically based on her past training as well as other, sometimes tricky to identify, factors. Your staff might avoid activities for several reasons:

- It could be a behavior conflict—high D's don't like paperwork.
- It could be a value conflict—learning a computer spreadsheet program doesn't relate directly to selling.
- It could also be a lack of proper reinforcement on the manager's part. A particular report may sit on your desk for several weeks before being read, and therefore the salesperson assumes it's not important to you. Here you could be inadvertently reinforcing a laissez-faire attitude. After all, why should the salesperson care about the report if you don't seem to? This can only be compounded if you were the one to initially ask for the report and stress its importance. While some of these examples have demonstrated subtle ways of changing behaviors, reprimands are often more direct.

An important note regarding reprimands: Always remember that reprimands must be saved for people who absolutely know what they are doing, but who are not doing it or not doing it well. Do not use reprimands for people who do not know what their job is or how to do a specific function of that job. Even if they know how to do it, make sure you have tried to motivate them and that you have worked through the training process carefully before you resort to reprimands.

A final level where a salesperson could be is both high in motivation and strong in the necessary skills. Time to let him coast, right? Wrong. If you are working with someone who possesses both the eagerness to produce as well as the skills and knowledge, then your challenge is to keep making both stronger.

One caution as it relates to your star players: If as a manager you turn to your thoroughbreds more often, knowing they are the ones

to usually come through, the results could ultimately turn into a “piling on” or “dumping” syndrome.

If the workload gets too high, the winners will begin to prioritize their work. That prioritized schedule may or may not be the same priority as yours. If it is not the same—the wrong reinforcers, aversive stimuli—ultimately reprimands often become the result.

As the frustration grows in both camps, the high achievers now become less motivated and less eager to perform.

The object is to let the winners stay winners. This does not mean that winners are to be ignored. It means to set short-term and long-term objectives, add parameters to any goals, and let the winners take it from there.

Keep in mind that winners, like all of your team members, will always need to improve upon existing skills and learn new ones. It is often a veteran salesperson that is used to the systems in place and prefers the status quo. This new level of training could set her back in this area. The trick is to not let it affect other areas of her work.

Remember that if you can keep her moving in the right direction, nothing could be better than a star player exemplifying positive behaviors.

The Catch to Training

There are two distinct challenges with training. The first is recognizing the speed that people take in learning. The second is the fact that one person will be in all four training stages at the same time depending on the skill.

Some people will move faster than others through the training cycle. Again, much of this depends on past experiences. In other words, if people can relate to something, they will absorb it faster. If a job or project is not relative to a past experience, the brain has to search for a place to store or connect that information. That search for relativity takes longer.

The answer is to take the time to understand all team members in the interview or goal-setting process. Know what they relate to and give them information during the training cycle that is conducive to their thought process.

The second problem, being in different stages of development at the same time, further complicates your role as trainer. This is a problem eventually because of the negative effect it can have on the salesperson over all.

Let's look at using sales automation software again as a skill. Someone may be excellent with a specific contact management program; however, if a new one is introduced that is mandatory to use, this person will automatically move a step backward. The desire may be there, but the understanding of the new program may not.

The new program will not work just like the older one, and if the salesperson is not introduced to it properly, getting to the next stage could be very frustrating. Even worse, the salesperson may develop contempt for it, and maybe even for you. Clearly something that if gone unchecked can hurt you and the rest of the team.

At this point, a good idea would be to relate the old program as much as possible to the newer version, highlighting the like features as well as the the differences.

As the person relates specific functions old and new, the new program becomes less complicated and the person becomes more comfortable.

The salesperson is now accomplished with the new program. It is now time to raise the bar and introduce him to the more advanced features that it offers. Of course, this means going back to the beginning in this area, so you need to start all over with tying in something that will help to motivate him.

Happily, the process works. Almost every training demand or problem has a solution. As a sales manager, you take responsibility for the training in order to move all people in the direction of your star performers.

Just imagine an entire staff of winners in all categories.

It is now time to focus specifically on one of the major functions of the sales manager: on-the-job training.

"Ride-Withs" or Joint Sales Calls

As a sales manager, you will likely have to be out in the field making joint sales calls with your salespeople. While your amount of time in the field may vary, the idea is to have your planning and reporting done in such a way that will still provide you with a great deal of time to be out on the road. Many argue over the optimal percentage—15 percent, 25 percent, 50 percent, or even up to 80 percent of your time—but it is really more dependent on your industry, your specific role, the type of sale, and your staff's capabilities.

No matter what the target for your time on the road, you will need to look back at the territory plan with your sales team members and make sure that you interweave your own plan, accounting for how your time will be spent. For example, if X sales rep is scheduled to see Q, R, S, and T accounts, then you need to plan accordingly if you are making any or all of these calls jointly.

Some of the factors to consider when deciding on whether or not to make a joint sales call are:

Distance. Is there major travel involved (by rail, cross-country, overseas)?

Organization of Territory. Is it by geography, where there is a more systematic approach to the visits, or is it more piecemeal, where a route needs to be developed from scratch?

Rank of Account. What is the overall value of the account (e.g., are they a must-visit or a nice-to-visit only if there is extra time to spare)?

Importance of the Sales Call. At what stage is the customer in the sales cycle?

Players Involved. Will the account have multiple contacts at the meeting, and are there other players from your company that are needed (e.g., technical specialist, financial specialist, etc.)?

Extenuating Circumstance. Is the salesperson having big problems with a key account or has a recent development just lifted an account from a Low to a High Value status?

Once you have laid out your own plan, there are several rules (do's and don'ts) to follow when making the joint sales call.

Far too often, the problem that many sales managers have is the urge to take over the sales call. When a manager sees a salesperson starting to lose ground, jumping in to try and save the day is what most managers believe is their role; however, it is often the worst thing you can do.

The rule in field sales training is to train during the "routine" calls. Do not set up on-the-job-training for must-get orders, drop-in/unannounced calls, or even emergencies (which may be necessary but are not part of training).

Give the salesperson plenty of warning that you will be riding along. One argument for short notification is that you can catch her

off guard and see what she is really doing when you are not looking. The problem with that argument is twofold:

- If she does not perform well, you cannot be sure if the reason is because of your unexpected presence or not.
- It sets up a level of distrust or unnecessary anxiety in the salesperson.

Others might still argue that if you give the salesperson plenty of notice, a “milk run” of the best customers could be set up. In other words, he knows the accounts where he has the soundest relationships and could steer you toward making joint calls to those accounts. Keep in mind that if the salesperson takes you to what he considers to be his best accounts, issues will still surface, especially with a B or C performer. They may not be glaring, but they will exist.

Therefore, if you give the salesperson plenty of notice and the performance is lacking or subpar, you will now be able to specifically target areas for improvement.

Choreographing the Joint Sales Call

Each call should be well planned. According to the experience level of the salesperson and the particular circumstances of the call, establish a leadership role. The general rule is that the salesperson should be the leader whenever possible. This can only help her confidence and increase her credibility with the customer in the long run. Of course, as a sales manager, you will inevitably have those really struggling team members where a routine sales call is never routine. This could also be the case with a new hire, who at some point needs to get his feet wet. Barring these two cases, the leader’s job is also to decide who is going to do what during the call. For example, the leader can decide who will handle the product features part of the call versus the pricing and terms.

As a sales manager, once your plan is determined, you must stick to it. Do not jump in or interrupt unexpectedly, do not correct (unless, of course, a critical error was made), do not let the salesperson give it back to you, and do not take over the call. If the salesperson falters, you can train after the call. Again, the idea is that together you have selected accounts and situations where the out-

come is not highly at risk. By trying to take over the sales call, you not only lose out on valuable training needs, but it could possibly end up hurting the customer relationship with you and/or the salesperson.

If, as part of the plan, you have already established that you can step in from time to time to clarify information, a great way to be in sync is to establish subtle signals. By tapping on his notepad, for example, the salesperson could indicate to the manager that her help is needed here, or, in the event that you have already stepped in, that it is time to give back the floor to the salesperson. Another approach is for the salesperson to finish whatever he is saying and then turn to you to ask, "Is there anything you want to add?" Again, after adding or clarifying anything, turn the call back over to the salesperson.

After the call (yet before the next call on your schedule), coach the salesperson using the reinforcement techniques and techniques given based on the training stage she is in. If you find that the training points you wish to discuss will require a great deal of time and effort, you could wait until the end of the day to review. However, if at all possible, never wait longer than that. Remember, delayed feedback can only increase anxiety on the part of the salesperson.

As soon as you can, reinforce what the salesperson did right first. Then you can seek to correct what the person did wrong. After that, always finish up with another positive.

You will also want to establish a follow-up time to ride with the salesperson again. Here you might want to have the salesperson plan accounts that will allow practice and demonstration of what was learned and hopefully improved on from the previous call. Again, this can only help to set her up for success.

To summarize, before training people, managers need to know how to transfer information in an efficient manner. Knowing a person's learning style allows you to take into account where he is in the learning cycle and apply the training accordingly. Reinforcement must be properly used to help bolster confidence and self-esteem.

The learner must also be eager to learn (motivational environment) and then will need to possess those skills and knowledge necessary for success. Always remember that people can be in different stages based on different skills and activities, and it is your job to go

at the appropriate pace with each individual to ensure that they are moving in the right direction.

Some key ideas to keep in mind:

- Train based on the learning styles.
- Always reinforce positive behavior.
- Train at a level and pace where transference can take place.
- Work through the learning cycle; do not skip steps.
- Guide your staff through stages of training.
- Ultimately you will generate winners.
- End the day with a stronger team than you began with.

COACHING AND COUNSELING

While we have separated much of the theory and practice of training from coaching and counseling, there is also a great deal of cross-over. In fact, the whole category of on-the-job training (making joint sales calls) is often called “sales coaching.” One way to think of it is that during the entire process you are acting as a sales coach, whereas the specific skills that are taught before, during, and after the sales call is the training.

Furthermore, there is also a fine line between coaching and counseling. The line here is between functionality and motivation. If a person has no knowledge or only partial knowledge of a particular job function, then that person needs to be coached toward competency. On the other hand, if that same person knows how to perform a particular job function and is just not doing so, there is another issue. This issue could range from a simple motivational one to a more complex one where counseling needs to take place. Another way to look at it is that coaching has to do with the performance and the standards set, and counseling has to do with a problem that is affecting the employee and that could be affecting others as well.

For the most part, they can both be looked at through the process of goal-setting. Because, as you have seen, in the absence of goals, you have nothing to be working toward.

GOAL-SETTING SESSIONS

There are six basic steps to developing specific goals for your team members.

1. Set your own goals.
2. Set the stage.
3. Get opinions and facts.
4. Relate your opinion and facts.
5. Develop specific goals with specific plans (together).
6. Follow up.

Understanding the importance of these steps is key to being able to carry them out effectively. In both motivation and training you learned that it is necessary to develop salespeople in a way that will allow them to be motivated from within, thus maximizing their capabilities. Goal setting is often a core building block in this process.

Goal-setting sessions are a key component to coaching your team. They should be positive and growth-oriented. Design them to help people develop in areas of weakness in a win-win environment. Therefore, be sure to not use these sessions to reprimand people, as this will defeat the purpose. As you learned, reprimands do not work when training; save them for those who already have task knowledge and skills and refuse to use that ability to develop the territory or to help the team.

It is your job as a manager to help salespeople develop specific goals with specific plans to achieve them. Many people do not succeed because they do not have a specific goal nor the necessary direction. If you assist your team members in identifying and achieving what they want, in turn you will get what you want.

The Process

With this purpose in mind, the steps are as follows:

1. Set Your Own Goals

This is the point to develop a strategic direction for the session. The situation may be dealing with a weakness in someone that needs to be strengthened. Another scenario may be to work more with someone who could be developed for a promotion. The goal could be as simple as showing someone how to develop better habits, or the goal may be as complex as helping the salesperson control outbursts of anger.

Whatever the reason, have a specific direction in mind before entering the goal-setting session. However, do not get so locked into your own goals that the individual's needs end up being ignored. In setting your own goals, eliminate personality and deal with functionality. A good way to think of this is to always ask yourself the question of how the goal relates to the job, rather than what is your personal opinion of the individual. It is helpful to keep in mind the person's DISC style and his internal motivators, as you will need to communicate effectively as well as tap into the right motivators along the way.

Plan a meeting date in advance with a mutually convenient time and place so there can be no interruptions. By not allowing interruptions, you're establishing the importance of the session.

Prior to the meeting, review any materials appropriate to the session, including previous meeting information, job description, articles, books, growth areas, etc.

Take into account everyone's time. As you know, experienced managers realize the importance of both their time and their sales team's. Often having the goal-setting sessions back-to-back with several people is not the best use of anyone's time. Pick the number of goal-setting sessions per month that you feel comfortable with. For example, if you have a core of six people, you could set time aside for one-hour sessions with each of them. You could then schedule one session every two weeks for twelve weeks in a row. The other benefit to doing this is that managers will get constant feedback from their people. Managers can develop their own coaching skills, and get better at goal setting and planning.

2. Set the Stage

Since these are meant to be growth sessions, the environment should be friendly and nonthreatening. The physical surroundings should be professional. Inform the person as to the purpose behind goal setting and how the session will be conducted. Also, stress the importance of the session itself.

At the end of the session, put a plan in writing. Taking notes during the discussion has its pros and cons. If you feel you need to take notes in order to keep track of key points, then do so, but keep in mind that it can be distracting and for some might add a level of anxiety.

The first meeting will be slightly different than the subsequent

meetings. The first meeting will involve a lot of discussion about goals and performance. Subsequent meetings will likely involve clarification of goals and interim checks.

It is not always necessary to prepare a detailed agenda for each meeting. In fact, in some cases you may not know in advance which skills the employee needs coaching in.

3. Get Opinions and Facts

Find out what the other person is thinking first. This is a two-way conversation that requires reciprocity. In order to know which way to take the goal-setting session, it is important to get further direction relative to the employee. Therefore, often the agenda for the second session will be established at the first, the third session agenda from the second, and so on. Coaching is similar in some ways to the interviewing process. You want to extract a great deal of information from the salesperson.

Ask questions that are open-ended and not leading:

- What do you like about your job?
- Is there anything you would like to change?
- What do you think you do best in your job?
- Where do you feel you would like to develop?
- Ideally, what would you like to be doing?

Generally speaking, the last question will directly relate to what you planned during the first part when setting your own goals for the session. If it doesn't, you need to ask more probing questions.

Here again are a few of those core interviewing tips to apply:

- Do not interrupt.
- Do not jump to conclusions.
- Keep an open mind.
- Listen, listen, and listen.

You will find out everything from "I hate to do paperwork" and "I am having trouble with certain customers" to more complex situations like "I don't know if I am cut out for sales" and "I do not like working with X, and something needs to change."

4. Relate Your Opinions and Facts

Review what the person's perception is about personal strengths and weaknesses. Reinforce the positives first. Agreement and recognition of the strong points will aid in the dialogue. On the items where there is no agreement, you need to ask more questions for clarification. Determine whether there's a discrepancy in your perceptions versus the employee's—for example, if the person thinks he does the job well when, according to preestablished standards, he is not doing the job appropriately. You might then need to provide clarification and once again relate everything back to the job description and performance standard in place.

Explain yourself. Any agreement or disagreement should be completely discussed. An honest discussion could reduce a very complicated subject to a simple one. It could also surface much larger, unknown problems that need to be solved immediately. Break the large problems down into smaller ones if necessary.

During the explanation, mentally get on the other person's side. Do not attack or try to put someone in the hot seat. On items of disagreement, be direct. Spending too much time posturing will dilute any message and distract from the subject at hand.

By being direct you must also be explicit. For example, the word *attitude* is an example of a term that has a variety of definitions and is used way too liberally by inexperienced managers. In dealing with someone that you feel has an "attitude problem," the first step is to define the behavior that is taking place that is causing that attitude. Definable problems have a much greater chance of being solved than those that are vague. By using more concrete terms and having specific examples or supporting evidence, you'll help to center the discussion around facts and objectivity rather than personality. This will avoid putting someone on the defensive or provoking anxiety, resentment, or even anger.

5. Develop Specific Goals with Specific Plans (Together)

A SMART goal now must be established for the salesperson. And the only way to reach that goal is with a plan. Also, as you learned in Chapter 3, when identifying goals, they could relate to corporate, departmental, and/or personal-level goals.

Be sure again to avoid relative terminology. If you ask someone to "communicate better and be more cooperative," you do not have a SMART goal in place. If that salesperson comes back the

next day and says a big “good morning” to everyone, who is to say that that does not constitute improved communications?

Most important is the need for the session outcomes to be agreed to jointly. Both parties should know what the objective is and how it relates to job performance. If you cannot do anything to help the salesperson reach that goal, then you might be doing just the opposite. Remember, problems do not typically go away by themselves.

Have the salesperson write down the plan that was jointly developed and keep it in a place accessible for her. Then track the daily, weekly, or monthly activities as needed to see that what is being done as it relates to the goals that have been set.

Inspect What Is Expected—Periodic Check-Ins

Be sure to check in as needed, especially on any specific milestones. It shows that you care, and, at the same time, if you don't follow up, it gives the impression that you do not care, or even worse, that it just doesn't matter. Again, keep in mind the balance between checking in and micromanaging. Also, the profoundness of the goal and the employee behavioral pattern may vary, so you may need to act accordingly. For example, checking in on very minor activities can be seen as belittling or condescending to many people. Also, unless you have reason to believe otherwise, there is no reason to not give your staff the benefit of the doubt.

6. Follow Up

The official follow-up should have everything to do with what was done in steps one through five. The major difference is that the first session starts with questions such as: “How do you think you are doing in your job?” and the main question to address in the follow-up session is “How did you do against your plan?” Responsibility is directly on the employee's shoulders.

Follow-Up Scenarios

There are three scenarios that can happen at the follow-up session:

1. The employee completed everything to complete satisfaction.

2. The employee partially completed the goals.
3. The employee did nothing.

In the first scenario, the manager should reinforce the success and then move on to the next set of goals. In the second case, the manager needs to probe and investigate. Why did the person not perform to satisfaction? The answers could be:

- Lack of knowledge that would require more training
- Lack of time created by other projects
- Lack of motivation or another more serious problem that might require counseling along with potential consequences

Whatever the reason is, the employee needs to be accountable at some level. Unless you were informed in advance of something unforeseen that impeded her completing the goal (and it was a legitimate reason) or you did not follow through on something that you said that you would do, then it still should be addressed. After all, two-way communication is key, and, assuming you are doing your part, it is incumbent upon the salesperson to communicate openly and accurately as well.

The third scenario mentioned above could be lack of motivation or plain insubordination. This is where the process turns from coaching functionality to counseling motivation. While the six steps could still generally apply as well, they require extra care, and you need to determine how and what your role should be.

Some problems are sensitive subjects that you might need to address, such as absenteeism, tardiness, and rude behavior, whereas others can go beyond the scope of your responsibilities and include more than just motivation and minor behavioral issues. No matter how severe you feel the problem might or might not be, it is necessary to first check with your legal and/or human resources department and get their input on how to proceed.

If the problem even remotely seems of a more serious nature, such as some type of psychological dysfunction, the manager's duty is to turn the employee over to a professional at once.

These categories would include areas such as:

- Drug or alcohol problems
- Physical threats
- Harassment of any kind
- Signs of abuse

Additional Legal Considerations

Remember, when in doubt or when something seems like a fine line, err on the side of caution. The information in this book is meant to be a guide and give you many of the core tools to help you succeed. However, it cannot delve into all of the specifics, nor can it stay current nor substitute for the law or your company's policies. Remember, as a sales manager, you have many new responsibilities, and one of them includes getting help when needed.

Of all of the job functions and skills needed as a manager, training and coaching through goal setting are some of the most important and widely used. They are not only something that you should not avoid, but something that you should embrace. Like other skills, they require a great deal of practice, so give yourself some time to allow them to build. This will increase your confidence as well. Also, as you have seen, they rely on many of the theories and techniques that you have been exposed to thus far. For example, they comprise a great deal of what was learned in interviewing, communications, planning, and motivation. In the long run, training, coaching, and counseling can be one of the most rewarding areas of sales management.