

KONA Group

Managers as Coaches

Case Study & Participant Feedback

Situation

KONA are currently changing the way a Major Australian brand manage and develop their people

At the start of the *KONA Managers as Coaches* program we opened the first workshop by asking the Managers the question "How many days a month do you spend in the field actually coaching your people?"

The response was extremely poor with the 12 Managers, who were managing a total of 63 people, having spent a total of only 7 days in field coaching between them!

When asked why they weren't doing more to develop their people they fell into 5 categories:

1. They were Newly Promoted and were concerned about personal credibility as they had not had any formal Management Coaching in the new role
2. They were good 'Technical' Managers with excellent Product knowledge but needed to be better People Managers
3. They were Experienced Managers who need to step up to become Leaders in the Business
4. They were too Administrative and spending too much time behind their desk working on 'very important strategies and reports' or sorting out problems (and when they did join their people they were 'seagulls' - dropping in, doing the business then flying off)
5. They had learned on the job and their skills had been 'handed down' internally

Subsequently, over the last few months the Managers have

- a) Been attending the *KONA Managers as Coaches* training workshops
- b) Receiving one on one coaching themselves
- c) Implementing the training by including in their busy schedule a discipline and methodology to include in their schedule, time in the field coaching their sales people

This document highlights their feedback and the increased impact they are now having with their People and Customers

Best regards
Glenn



The KONA Group
'Because Hope Is Not A Strategy'

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How many days a month are you now spending coaching your people? Why?

Responses

- 4 – 6 days per month. It is providing some good feedback as to how they go about their day to day activities and planning. It allows you to see in real time and real experience, what they are dealing with. Rather than them telling you in a sales meeting.
- 2 days a week at an average
- I only coach the one person at this stage so once a month
- 3 - 4 days per month, 1 day with each rep each month.
- Minimum of 4 days per month. This has always been the case within our organization, however now there is more focus on getting the most out of any customer visit through high value questions.
- One day a month with each rep to make sure they understand and continue to improve on pervious coaching.
- Four days per month minimum is the current aim. My major focus is on the 7 sales reps that are now reporting directly to me. A schedule has been implemented and wherever commitments permit extra sessions are to be slotted in. The coaching revolves around improving the quality of customer calls and maximizing business opportunities by proper preparation, structuring the visit around asking high value quality questions and ensuring follow up from calls is acted upon swiftly and professionally.
- Typically 8 days per mth. As we work in an extremely competitive market it is paramount that the right message is conveyed to our customer, which is, that we are here to provide solutions for their business requirements, the best customer service and product quality and that for this we are always striving to achieve the best return for our company.
- Approx. four. The aim is up to eight but this has dropped off due to a few changes in the business. The plan is to increase to six a month by September. The coaching is important as it helps build better sales people and benefits myself as this is at least another six days which I am in the market place.
- March x 2 days, April x 1 day, annual leave through May & June.
July will be nil days with sales team restructure (2 x Reps removed + 1 x Sales Administrator), production output modelling for FY'11-'12 shutdown schedule & Budgeting associated with both. August has 4 x days locked into calendar the only way to achieve required coaching days
- One to two days a month with each rep to make sure they understand and continue to improve on pervious coaching

What are the 3 things you have learnt most from the KONA Workshops?

Responses

1. It is better to be a coach than a manager
2. People are motivated by different things. It is important to find out what motivates each person
3. To get the most out of a sales call preparation is the key and going in there with a plan and goals of what you want to achieve

1. Active listening to both customers and staff.
2. Pre planning meetings to get the best result.
3. Value Proposition. Packaging all our services into one.

1. You need to “attend the game” your team plays in. with out this, you cannot fully determine what they are encountering on a daily basis. You need to describe, demonstrate and help them achieve what you are coaching them on.
2. How the relationship changes between you and a customer when you become a strategic advisor. They become more loyal, and tend to open up. They tend to be better conversations as you are not just discussing “the order” it is usually right at the end and now, a minimal part of the meeting.
3. Teaching my team, the concept of the 6 sources of influence. I had my team each perform this analysis on some thing personal in their own lives. They then met with me to discuss their results and to provide feedback. It seemed to get their mind racing beyond its normal train of thought. Especially the younger team members. He was very motivated to try this method for work related goals, once relating it to his personal goals.

1. Planning techniques
2. A greater understanding of the overall approach to coaching.
3. Assisted in understanding sales staff requirements & personalities.

1. The importance of forward planning, having a set purpose and goal before sitting down in a customer meeting
2. The importance of taking the time to see customers with your sales team and the value and potential to come out of taking time to coach them
3. The difference implementing the selling platform in a structured way can make on improving sales results

1. A lot of revision on what I have had in previous personal development and sales training.
2. To continue to be a coaching style manager as it gets results
3. The type of conversations you have can be critical in setting a path for my people

- 1 . Goal setting for the team, in our case Salesforce had a slow take up but we are now meeting on a regular basis to share each others knowledge and expand this across the team
- 2 . Empowerment and delegation
- 3 . Communication, as in results, boundaries and sharing success

- 1 . How to coach
- 2 . Share information/strategies with other colleagues
- 3 . better prepared/more productive

- 1 . Continual review of employee's performance and subsequent training/development is essential to ongoing success.
- 2 . Be prepared, ensure team are prepared for all customer visits. Time is limited, maximise available time
- 3 . Crucial Conversations lead to results

- 1 . How to coach
- 2 . Share information/strategies with other colleagues
- 3 . Crossing the chasm

- 1 . Varying managing styles I can adopt to different staffing types
- 2 . My time management skills were not as 'good' as I thought and in turn I have improved and become more ruthless
- 3 . Importance of linking personally focused motivation to the coaching of the team

How are you adding value to your people by spending time coaching them?

Responses

- Value by coaching – showing them I genuinely care about them and want to work with them to help them achieve their goals.
- Offering advice on what can be improved and key learning's from the call.
- Giving them a chance to take me where they think I can be of most benefit.
- Spending the time with them out in the field is helping to improve their confidence when meeting and talking with customers, particularly new ones. Also helping them to realize that often potential leads and opportunities arise in the conversations they are having with their customers and helping them to recognize when something mentioned could lead to an opportunity and making sure they delve deeper into this conversation by asking a few questions about it.
- More discussions on what they do. What makes them tick and how they go about things today. Valuable for understanding the next phase of their development.
- As previously indicated there has always been a focus on spending time in the field with our sales team. However the additional focus of pre planning and getting the most out of a meeting with a customer has paid dividends.
- Better communication between rep and customers
- Plan their days more efficient
- More success with orders
- By bringing them together with one clear strategy of how to deal with a difficult market
- With a relatively inexperienced team it provides an opportunity to get to know them better, both professionally and personally. Feedback following visits will influence their future behaviour and assist with meeting targets and objectives.
- Time management has been a big one, increasing there hunger to be successful. Stressing that sales isn't a walk in the park; high levels of planned activity will breed success & confidence going forward.
- I believe it aids in your teams perception of you. By seeing you become involved in what many people believe they no longer have to do once they are a manager. It shows you are a leader when you are prepared to get involved at all levels with your team.
- Planning, planning, planning!!!
Prior; I was not letting Rep know I was joining them for the day almost forcing a well planned day and week. During; not just a social call which was typically.
- Better communication between rep and customers, teaching them are they are asking the right questions. Plan their days more efficient. More success with orders and margin through better customer relationships

What changes have you made and seen with your team?

Responses

- They plan their days better and how they approach the sale
- Made changes in the way we go about the call. There is now more structure in the visit.
- The coaching days now often tie in with targets set in the SLP for the month.
- Plan and understand the sale/customer better
- I have profiled each member of my team the same way we did in the training course in late March. This was a great exercise as it allowed myself and each team member to get to know each other more than we ordinarily would. I now know what really makes them tick, what motivates them, what goals they have set themselves etc..
- The obvious change has been the importance of understanding their time and what they are worth in dollars per hour to the company. Approaching every meeting with a purpose in mind.
- Implemented the Hearts and Minds selling process managed through their Pipeline system, this has aided getting my sales team to operate in a more structured way and also helped push them to see the right type of customers with a clear view of what they are trying to achieve. They are managing their time better, focusing on certain tasks with clear goals
- Overall planning and activity, the reintroduction of sales leadership plans to increase measured activity levels in an increasingly deflated market place.
- Some members of the team have lacked the confidence to make decisions. Greater empowerment in dealing with issues and decision making has been presented. At sales meetings increased feedback from the team is being encouraged including the sharing of experiences with customers, both positive and negative. Review of customer call cycles is being undertaken to ensure the right balance is being achieved and customer visit preparation is the focus.
- Many structural as I have had a lot of change with staff moving on and new members coming in.
- We have reorganized the customer list with the intention of equalizing the load and matching customers to reps where possible. In some instances reps that were good with contractors were not so good with builders. While we work on their weaknesses we have aligned the rep to their strength to start off.
- Better communication between rep and customers, teaching them what they are asking the right questions. Plan their days more efficiently. More success with orders and margin through better customer relationships
- The allocation of all accounts to platforms with direction to team of balancing time platform to customer platform. The realization of time commitment versus time requirement has refocused the team to concentrating on accounts where the most short term and long term market share gains are available.

What is now happening in customer meetings that wasn't happening before?

Responses

- More strategic discussion as a result.
- Preparation. Breaking the ice and chewing the fat must still be done, however there is a clear objective that needs to be reached.
- Sharing of information on how a new strategy has help or been beneficial to the sales call
- More questions and information transfer than simply talking price
- In the past they 'sort-of' knew what they wanted out of it but weren't as eloquent in communicating it. When sitting back in the meeting it is now very apparent watching the conversation unravel with the customer as the conversation flows towards their goals.
- A far better understanding of what we have to offer the customer and probing to find out where we have opportunities to offer these to the customer.
- More focus on actually trying to increase our product offering to the customer, more questions are asked to identify if there are any products we can sell to them in addition to what they already were buying. This is also a result of the forward planning that has resulted from a more planned and structured selling process.
- Group rapport in the sales meetings is now far my alive and engaging. Each team member seems to through ideas on the table far more openly allowing the team to decide future plans and goals, not just the sales manager.
- Asking the right questions, breaking the ice, ensuring that we are speaking with the decision makers in the business. Time is valuable in sales, speaking with the wrong people is time wasting, and unproductive. Pushing the price burger, value adding.
- More delving questions are being presented to the customer. The sales team is now searching to find out what we can do to improve their business and also make dealing with us easier. A greater emphasis is being shown on influencing the customer.
- I have removed Operational Comments (product complaints, yard issues etc.) from being raised in meeting. All matters are to be raised directly with Works Manager immediately which has two benefits; no further jobs are dispatched from the same batch and reduces time of meeting by 40 minutes – 1 hour.
- Round table format of Reps noting key opportunities and associated actions for the period prior and coming. Helping the habit of working on goals rather than 'just doing the rounds'. Sharing of information on how a new strategy has help or been beneficial to the sales call and brick walling customer for strategic targets

Which skills are your people lacking the most?

Responses

- Planning and sales technique skills. A bit of revision to what they started in their KONA training would be an advantage.
 - Planning / time management
 - Not speaking with the right people
 - Activity
- Probably more around planning efficiently their day, which is what I want to focus on over the next few months.
- Negotiation, up selling and networking opportunities
- Lack of knowledge of competing products in the market, which makes it difficult to explain the advantages of our product offering over a competitors or substitute product.
- With some, it is the ability to break the ice and gain a good rapport with a respective customer quickly. With others, it is simply adapting to the fast pace world we now live, i.e. the use of technology in their day to day activities.
- Market intelligence
- Possibly, if any, the ability to forgo what they know or have done previously for the sake of trying new ideas or concepts. 80% of the sales team are long-term employees in the masonry industry so my job is to sell new concepts or ideas to them.
- We have been very slow to take on platform process, this will be our first month putting together SLP's but we are meeting regularly just to focus on getting up to speed.
- Pipeline
- Remembering and communicating the service offering we have available to our customers, even with laminated cheat sheet provided for keeping in front of diary.
- Planning is being drummed, I mean coached into team yet the skill or choice of using the skill of planning is lacking

What % of your team are implementing the Pipeline process as a way of working?

Responses

- 50% at the moment, respectfully, the younger team members adapt far quicker, still working on this with the others.
- 80%
- 60%
- 60%. Coaching plans are being developed and will be the subject of ongoing training.
- 85%
- My team are probably close to 80% of the way to having it engrained in their day to day life. Some more advanced than others but all improving each day.
- All sales staff in NSW are 100% familiar with Pipeline
- 100% - All of the team are using the Pipeline each month with a review meeting at the start of the month to talk about the previous month and set targets for the current one just starting.
- All are fully aware as described in changes already implemented above yet the importance some individuals are placing and seeing in balancing their Pipelines is taking time coaching

Summary

After only 4 training workshops spread over 4 months the Managers have made a huge leap forward with their teams in a very short space of time.

Many are now adding value in a way they weren't previously doing or thought they were capable of, and their people are benefiting from it

Their People are now planning better, managing their time more effectively, and starting to understand their customers at a different level by asking better questions

Ultimately, they now have more people achieving sales targets

If this case study is of interest to you, we look forward to discussing it with you further and to see how we can help your Managers

Best regards
Glenn

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