

Sales Coaching Plan

Sales Rep		Sales Manager	
Name		Date	

1.	Current Sales Pipeline				
	The number of existing deals in my Sales Pipeline and the stages they are at.				
	<p>Benchmark where they are now and discuss the Sales Persons data asking for any reasons they believe that are holding them back. These challenges may be genuine, and if so do whatever you can to remove or lessen them. Review their Sales Pipeline, documenting how many "deals" are at each stage of their pipeline. Check the historical data and look for any trends in the number of opportunities that fail to progress from one stage to another. Remember the Sales Pipeline will always show a reducing number of deals, the role of the Sales Coach is to spot the areas that can be improved in each stage of the Sales Pipeline. Ensure the Sales Person knows what qualifies a deal to progress from one pipeline stage to the next and equally important what doesn't.</p>				
2.	Challenges				
	What Skills or Conceptual challenges are holding you back?				
	<p>Talk through the Sales Persons Sales Pipeline and ensure clear next steps have been identified for each deal in the pipeline and identify any skills or conceptual gaps in the Sales Person that need addressing. A skills GAP is simply when they don't know how to do something, a conceptual Gap is when they know how to do it, they are just mentally uncomfortable doing it – this is more difficult to fix. In both cases ask the Sales Person to pick a deal where the GAP exists and then you as the Sales Manager complete their next clear step for them. Pick up the phone, write the email do whatever it takes for you to demonstrate how the task should be done. Next let the Sales Person pick another deal and ask them to complete the task in front of you. First regardless of how they perform the task, pick something positive and commend them, and then pick something that wasn't so good and recommend a different approach. Lastly commend them again for trying and encourage them.</p>				
3.	New Sales Plan				
	What new Sales Activities and or Learning & Development do you commit to completing and by when?				
	<p>Using the data of the best performing Sales Person now create a new Sales Plan with the person. Don't focus on end results or sales, instead focus on completing the next clear steps required, to move each deal to its next stage in the pipeline, and or adding new deals to the pipeline. If the Sales Person does this then by default sooner or later they will sell something. In the initial stages do not try and raise the Sales Persons performance to the level of the best performer as this could be too much in one step. Create as a minimum daily and weekly milestones. Break the performance GAP down into smaller chunks that are more achievable, so that you can generate some small short term wins that will build confidence.</p>				
4.	Accountability				
	How do you plan to hold yourself accountable to the new Sales Plan?				
	<p>Ensure the Sales Person agrees to the new Sales Plan, agrees to the timelines in the plan and then ask them how they will hold themselves accountable to the new Sales Plan. Help them understand how powerful accountability is but don't force accountability on them as they may resent it. Repeat the process and spend as much 1-2-1 time with the Sales Person as possible to encourage and nurture them.</p>				
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;"><i>Manager - Signed</i></td> <td></td> </tr> <tr> <td><i>Sales Person – Signed</i></td> <td></td> </tr> </table>	<i>Manager - Signed</i>		<i>Sales Person – Signed</i>	
<i>Manager - Signed</i>					
<i>Sales Person – Signed</i>					