

## Field Based Coaching



To begin with, let's have a show of hands...

Could you put your hand up please if you ever spend time visiting customers with a salesperson? So this could be as their Sales Manager, or as a colleague of theirs from the sales training team, or perhaps even an HR person who specialises in training & development *per se*.

If you now have your hand up in the air, then keep it there if you've received formal training in coaching skills. If I was giving points out at this stage, then I'd be giving extra points if you'd also been required to demonstrate your capability to coach effectively as part of this training!

Hopefully we still have quite a few hands in the air. Now here's the crunch: keep your hand in the air if you've also received formal training about how to prepare for, implement, document, and follow-up field based coaching. So this is not about coaching skills, this is about how to *apply* coaching skills in a **field based capacity**.

If you did have your hand in the air up until this point (in either a real or imaginary way), it's almost certain that you've now put it down, because the vast majority of organisations don't provide such training. Which is very strange, because...

- ...the Sales Manager's time costs money. It makes sense to ensure that time invested in field based coaching accrues maximum returns. That can't be achieved unless the Sales Manager knows how to conduct this activity effectively.
- ...when properly conducted, field based coaching accelerates development of the salesperson's selling skills and helps to grow their confidence. Both of which increase their ability to exceed in their job role, which in turn underpins the Sales Manager's ability to achieve their own job purpose of *achieving sales through others*.
- ...when conducted poorly, 'field based coaching' (in italics here as it's probably more akin to a day out with the salesperson rather than field based coaching!) can impact negatively on that day's selling activities and damage salesperson motivation. Neither of which are good news for the salesperson, the Sales Manager, or the organisation as a whole.
- ...when the above happens consistently, then the whole sales team will view the Sales Manager's time with them as something to be avoided. Or cleverly managed... which is when 'the milk round' happens! Which makes the day a waste of time for both the salesperson and the Sales Manager. And makes the wages paid to them that day a waste of money.

### About the author

Tim Royds is director of *highclere*, an organisation that provides bespoke B2B sales consultancy and training solutions in the UK and internationally. He has over 30 years' experience in sales, Sales Management, sales coaching, sales consultancy and sales training. He is also author of the part-published 9-book series "Sales Management..." each of which focuses in on a specific facet of this challenging role.



More positively, I can provide two pieces of better news... Firstly, an excellent book is about to be published which considers field based coaching in some depth (!), and secondly, this and the next edition of *21<sup>st</sup> Century Sales Management* will provide some thoughts on the key do's and don'ts around this activity as a more immediate source of help...

## Terminology

Different organisations refer to this activity in different ways... field accompaniments is a term that's often used, and in the United States the term 'field rides' is common too. For the purposes of this and the next article, I'll use the term 'field visit' to refer to time invested with the salesperson, and 'field based coaching' to refer to the activities of communication between the accompanying sales coach (who most often will be the Sales Manager) and the salesperson.

## Preparation

You may well have come across the six **P**'s: "**P**rior **P**reparation **P**revents **P**retty **P**oor **P**erformance" (or something like that!). This is equally true of field visits and field based coaching as it is of professional selling. Indeed, when conducting field visits the Sales Manager is acting as a role model; if they arrive for the day without any prior thought and preparation why shouldn't the salesperson do the same when meeting prospects and customers?

So just as you'd expect a salesperson to have thought carefully about setting SMART objectives prior to a customer meeting, it's important to think carefully about setting SMART objectives prior to conducting field based coaching. These should be related to developing the skills of the sales person, for example: *"to observe implementation of the development plan written on conclusion of the recently attended 'negotiating skills' programme. To agree upon area(s) for further development as required."*

Setting such objectives provides a focus for the day and communicates clearly that the day is going to be managed as a professionally structured development exercise to increase selling ability.

### "Sales Management: Field Based Coaching"...

...is the fourth in the nine book "Sales Management..." series. Focused specifically on this critical Sales Management activity, this book is scheduled for publication late summer 2017.

Copies of the first 3 books in the series can be purchased via Amazon and Kindle at [bit.ly/LinkToBooks](http://bit.ly/LinkToBooks)



Since the focus of the day is going to be developing the salesperson, it's most definitely worth engaging them in a conversation so you understand what *they* want to be coached on. I'd certainly recommend focussing on a specific aspect of performance rather than 'selling skills' in general, otherwise coaching can become so diluted that it

becomes meaningless. For the salesperson to achieve an understanding of how to do just one thing differently, for this understanding to be absolutely clear, and for them to be highly motivated to implement this change, is a good result.

When I'm asked to conduct field based coaching with salespeople (often as a follow-up to a training course) I'll initially conduct a conversation by telephone to run through what the structure of the day is going to be and to ask them to consider what they want to gain as a consequence of us working together. All this is confirmed before the day in writing too.

The style and format for the day also needs to be agreed in advance. There's the issue of how the manager is going to be introduced to the customer and who's going to do what during the meeting (more of this in the next article). It's also important to ensure the salesperson plans the day so there is sufficient time between calls to debrief and coach each meeting. This might sound like stating the obvious. But if these disciplines are not already in place then don't be surprised if the salesperson has assumed that to make a good impression on the Sales Manager it's necessary to cram into the day as many meetings as they possibly can.

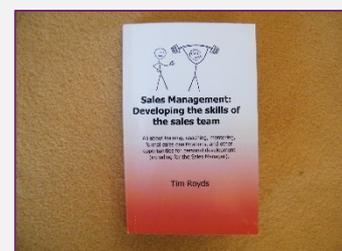
Having said that, it's equally the responsibility of the salesperson to ensure they gain the feedback and coaching required to support their development. Although again, the extent to which they do this (and even if they do this at all) depends on what they are used to and what they think and perceive this activity is all about. If they perceive that the Sales Manager is coming out with them for the day to check up on them, then the likelihood of this happening is not high.

The salesperson also needs to understand in advance the style of the coaching discussion; how long it's going to last, what structure the conversation will have, what's going to happen as a consequence of it, and how it's going to generally 'feel'. Of course, structure this activity consistently and everyone will know all this already, because it has become the 'norm'. When introducing a professional coaching structure to the day initially though, all these things will need to be described and agreed to in advance.

**Comment:** There's an in-depth discussion on coaching in the book **"Sales Management: developing the skills of the sale team"**

*"...provides a practical and accessible manual to help busy Sales Managers achieve results and increase & enhance the skills of their people.."*  
(Debbie Carter, Editor, Training Journal)

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## The Manager as a salesperson

The principle role of the Sales Manager during field visits is to coach. This means that they should not be involved in the sales discussion. What they are there to do is observe, in order that they can coach the salesperson afterwards utilising their observations of the salesperson's behaviours (what they did, and what they said), and what behaviours the customer used as a consequence of the salesperson's behaviours.

Sporting analogies can sometimes be quite powerful, and this is one of those occasions... The top sports coaches sit and observe from the side-lines. They provide feedback about what the sportsperson is doing and what they achieve as a consequence. They might even review with them video-recordings of their performance. What they don't do though is tell the sportsperson to sit down and then go play the match on their behalf! The role of the Sales Manager is not dissimilar.

Having said that, there are occasions when it's absolutely appropriate for the Sales Manager to become directly involved in the selling activity, and so contribute directly to the achievement of the business related goals of the day. These are...

- When visiting a Key Account – we know that successful Key Account focussed organisations involve senior management directly as a kind of 'signal' that the purchasing company is indeed 'key'. Such contacts though should not undermine the authority and position of the Key Account Manager; their role as the leader of the team interfacing with the account should be constantly reinforced.
- When someone with appropriate authority is required to manage a complaint or high-level negotiation – though it's important again for the customer to understand that the salesperson still leads the relationship. Phrases such as "*Steve has asked me to join the meeting as I have the necessary authority to sign off the agreement today – though it's important to emphasise that it's Steve who is responsible for your account and who I will be asking for recommendations on what is appropriate...*" will help achieve this.
- When demonstrating for a newcomer to the role of professional salesperson – the same principles of field based coaching will apply here all the same though. The focus though is different, with the Sales Manager discussing what *they* did, what worked well, what they could have been done differently, etc.

## Summary (so far...!)

Conducted properly, field based coaching provides significant benefits to the salesperson, Sales Manager, and the organisation... not least of which is the accelerated achievement of the organisation's sales plan. That's why it should be considered to be a critical activity. Few organisations though provide their Sales Management team with any formal training input in this area.

Preparation for the day is key. It's this which ensures that the day is indeed focused on the development of the salesperson, and is set up to maximise returns from this activity.

(contd.)

The main role of the manager is to observe, and to then use these observations to fuel the coaching conversation afterwards. The role is not to do the selling on the salesperson's behalf!

## Next edition of 21<sup>st</sup> Century Sales Management...

...will be available in November 2017, and will be focused on some of the do's and don'ts when conducting and following-up field visits – and in particular how avoid taking over the meeting with the customer!