



Running Effective Coaching Sessions

- **Preparation**

- Review tools/gather information
 - Pipeline
 - Call statistics
 - Activity statistics
 - Monthly results
 - Personal and corporate goals
- Determine focus for upcoming session
- Customize agenda to individual needs
- Develop probing questions to uncover needs/gaps

- **Activities**

- Head check - determine mental state: willing, committed and able
- Ask for their agenda
- State your agenda
- Review prior session's key objectives/accomplishments
- Uncover gaps - triage
- Review current pipeline
- Discuss goals and strategies
- Address open items (service, competition, career path)
- Create action plan/focus areas for upcoming month

- **Find Opportunities to:**

- Coach
- Council
- Provide feedback
- Roleplay
- Brainstorm
- Strategize
- Encourage
- Transfer knowledge

- **Improving Planning Sessions**

- Ask team for feedback
 - Positive
 - Constructive
- Have your manager sit in on planning sessions
- Sit in on other managers' planning sessions
- Create a proper environment
- Understand what you and associate want to accomplish
- Customize agenda



Running Effective Coaching Sessions

- **Avoiding Obstacles to Conducting Planning Sessions**

- Scheduling conflicts
- Too many topics
- Not enough time
- Crisis
- Lack of preparation
- Interruptions
- Poor agenda
- Operational issues
- Phone calls
- Fatigue
- Setting poor expectations
- Remote sales associates

- **What the Sales Associate Wants to Accomplish**

- Recognition
- Strategies on specific accounts
- Career planning
- Honest and open feedback
- Help with issues
- Review compensation plan
- One-on-one training
- Action plan for next session
- To "vent" and be "heard"
- Motivation and encouragement
- "How do you think I am doing?"
- Pre-call planning



Coaching Session Form and Email Recap

Coaching Form for (NAME): _____

Date: _____

Next Session (DATE): _____

Coach's Agenda

1. Get update on recent activity
2. Review target industries
3. Pipeline planning

Participant's Agenda

1. Recap recent closes
2. Discuss step on pending business
3. Help to get appointment with ABC Company

Review progress on last week's goals _____

Congratulations on recent closes _____

30/60/90 Day Goals

30-day goals: Work toward December 31 goal, focus on specific vertical(s)

60-day goals: Create top 25 prospecting list

90-day goals: Revenue projection update

What is working? _____

What isn't working? _____

Obstacles facing _____

Review pipeline report _____

Review strategies for upcoming appointments _____

Review upcoming week's prospects _____

Goals for upcoming week _____