

OK, so you're the coach. Now what?

Ask a sales manager what his biggest problem is, and you have a better than even chance that his answer will be “finding and keeping good people.” Ask them what “good people” are, and he’ll tell you that they are people who can do the job.

All of that is true, but too often it means people who can do the job without the benefit of one of the sales manager’s most important functions — coaching.

In this article and the accompanying sidebar we will present and illustrate a relatively simple, but highly structured model for coaching and discipline that will help your people grow and — perhaps most important for you — will prevent your having the same conversation over and over with salespeople who are not performing properly.

Some Ground Rules

Before presenting the model, there are three fundamental principles about dealing with our salespeople that we need to keep in mind.

The first is that the problem may be our fault, a lack of communication or — worse still — mixed messages. The salespeople don’t have a clear idea of what we want or what they should do.

The second is that we manage behaviors, not results. We measure results; they show us areas where problems exist, but until we uncover the behaviors that need changing, we haven’t really found the problem to solve.

Finally, discipline should never come as a surprise. The nature of disciplinary measures should be communicated to the entire sales force before they are used. For instance, you can tell your group, preferably in writing, that failure to perform appropriately will result in probation for a

specified period, and salespeople on probation will not participate in any sales contests or bonus programs.

There’s another, more general point. While coaching may be applied to each situation as needed, discipline must be administered fairly. If Salesperson A is disciplined for not maintaining his or her territory plan, then every other salesperson, even your super star, should be treated the same way. The point is, you should determine how far you’re willing to go before beginning the disciplinary process.

The Model

There’s a wealth of literature on coaching, counseling and discipline. However, most of us will improve our coaching processes significantly by dealing with just four steps: diagnosis, direction, discipline and — if necessary — termination (or, to maintain the alliteration — departure)

1. Diagnose

The first step is to determine what the problem really is. Assuming that you’ve communicated your expectations properly, there are three possible reasons that the salesperson is not doing what he or she is supposed to: the salesperson does not have the requisite skills; the system (i.e., the company’s policies, procedures, etc.) defeats the salesperson’s efforts, or the salesperson simply refuses (the ever-popular “That’s not the way we’ve been doing it” syndrome).

To determine which of the three reasons you’re dealing with, use a three-step approach.

1. Describe the desired behavior clearly and specifically.
2. Describe the behavior that you’ve observed that differs from the described behavior.

Be specific and use objective measurements. For instance, instead of saying, “I don’t think you’re spending enough time developing new accounts,” you might say, “Since we started the new business drive we agreed that you would make four calls a week on target accounts. According to your call reports, you are not making more than two calls a week.”

3. Explore the reasons for the difference between the desired behaviors and the observed behaviors with the salesperson. Be aware that the first reasons given may not be the ones that you will have to deal with.

The objective at this point is to determine which of the causes listed above you’re dealing with. This is the most important step in the process, because if you don’t diagnose the problem correctly, there’s little chance that your remedy will work.

2. Direct

The second step, once you’ve determined the cause of the problem, is to provide proper direction. This differs from the old “slap and point” method of coaching in two ways. The first is that it directs the employee in terms of specific behaviors. The second is that it uses as much input from the employee as possible. At best, the plan for improvement will be suggested by the salesperson and blessed by the manager. The plan must include measurements and a date that the behaviors will be reviewed. At this point the employee should be reminded of the consequences of not improving — the previously published disciplinary policy. The safest method is to give the employee a reminder memo — purely as a reminder — when you agree on a plan of improvement.

3. Discipline

If, by the review date, the employee is demonstrating improved behaviors, all you have to do is praise the employee for the improvement and fine tune the behavioral goals and review dates.

But what if things haven’t improved? At this point, if you want to maintain your credibility, you very little choice; as promised in the previous meeting, you must take disciplinary measures. If you have taken the appropriate steps (published the policy to the staff and reminded the sales person at the direction meeting), this should not be surprise to the salesperson. The only concern is that the discipline be applied fairly and according to the published policy.

4. Termination

Termination is the final, worst-case step. It is also the logical conclusion to the process. If we have communicated our objectives properly, provided the necessary training and coaching, and have provided feedback to the employee, termination, if necessary, will not be a surprise.

Termination, however, is not our goal when we begin the process. Our goal is turn all of our salespeople into “good people,” people who will help us — and themselves — win in the marketplace.

In the sidebar on the next page, a fictional sales manager deals with a salesperson who is not producing according to company objectives. To fully illustrate the model, we assume a worst-case outcome at each step. That’s not the way it always works.

FOR EXAMPLE

Terry Franks, the sales manager for Calcon Distributing, wasn’t looking forward to the next meeting on his calendar. He had asked Fred to come back to the office today

to discuss his lack of success with the new Nonox line. Terry fully expected a full hour of excuses and rationalizations; Fred was like that. He looked at his watch, blew out a long breath, and began straightening up his desk. Fred came in and slouched into the chair.

“What’s up, Terry?” Fred asked.

Terry took a stack of paper from the top of a stack. “I’ve just been looking at the results on the Nonox line. You know, we made a real commitment to the manufacturer when we took on that line; I’m concerned that we’re not getting more Nonox business from your territory.”

Fred shook his head. “I don’t know. That’s just not something my customers will use.”

Terry looked at the numbers on the paper. “That surprises me. Ed and Ann are both having a lot of success with Nonox; made a nice increase in their commission. Frank has a little bit of a rocky start, but over the last month, he’s come along very well. I really think this line could be very profitable for you, Fred. I know it’s going to be profitable for the company.”

Fred just sat there and looked at him. Finally, he said, “Terry, with all due respect, I think I know my customers better than anybody here.”

Terry choked down the first response that jumped to mind. That wasn’t really what they wanted to talk about. “How many Nonox demos have you done for your customers, Fred?”

Fred shrugged. “I don’t know. I know I’ve done some.”

“Could be. But I’ve looked back through your call reports, and you didn’t mention any. How do you feel about demoing the Nonox line? You comfortable with it?”

“I guess. Not as comfortable as I am with Essex. I can do those in my sleep. And, like I said, my customers are happy with them. They don’t really need Nonox.”

“Maybe. But let’s give them a chance to make that decision. Why don’t I ask Ed to make some buddy calls with you on some of your customers? On the first few, let Ed do the demo. Then you do it. We’ll talk about this again at our regular territory review on the 15th. In the meantime, I’ll speak to Ed and you set up some appointments.”

Two Weeks Later

Terry could tell that Fred was not particularly happy when he came in for the territory meeting. He could guess why. In six sales calls Fred had made with Ed over the past two weeks they had found only one customer who was not a prospect for Nonox. They had actually gotten trial orders from two and promises from the other three that they would consider the new line. Fred was probably expecting Terry to say, “I told you so.”

Instead, Terry said, “You feeling better about demoing Nonox now that you’ve done several more?”

Fred nodded. “Yeah, I guess so. I was able to get through it without any problem on the last couple of calls.”

“And on one of those you got a nice order. Makes a difference in your commission. Good work.” He stopped and looked at the figures on his desk. “Now, I would like to work on a plan to make sure we build on that. What do you think we ought to do?”

“I don’t know. Do some more demos I guess.”

Terry nodded. “That would be a good idea. Let’s think about this next month. What do you think we can do during the month.”

“I guess I have about fifteen good sized accounts that I could show Nonox to. I could probably demo those.”

“That sounds good. How about getting me a list of the customers you plan to demo, and we’ll take a couple of minutes every Friday to go over the results. That okay with you?”

Fred nodded. Still not particularly happy.

“Think about it this way,” Terry said. “This new line is not only money in your pocket, but it’ll go a long way toward protecting those customers. Nobody has a better line than Nonox. The other thing, Fred, is that the company is solidly committed to this line; we think it will be very big in our future, so we need all of our salespeople to be committed to it.

This is serious. You’ve got a good plan, and we need to work it.”

Terry picked up a sheet of paper from his desk. “This is the memo we gave everybody a couple of months ago on our disciplinary policy. I’ve made it a policy to give a reminder copy to anyone who might be in danger of disciplinary action.”

If we stick with this plan, that won’t be a problem. You know if there’s anything I can do to help you with it, I want to.”

Fred just nodded, got up and walked out.

Three Weeks Later

Fred looked as grim as Terry felt. He knows what’s coming, Terry thought. He should. At each of the last two Friday meetings Fred had shown up with excuses, but with no reports of demonstrations of the Nonox line. There had been no more orders for the line out of his territory — except for one order that came in from Ed’s earlier demo.

“Tell me about Nonox,” Terry said. He already knew the answer; he’d heard it for the last two weeks.

“I really haven’t had a chance to get to it, Terry. We’ve had problems with Ingle, and I had to spend a lot of time on that.”

Terry took a sheet of paper from his desk, looked at it. “Fred, this is a memo saying that as of today you’re on probation for thirty days. The conditions of the probation are outlined here as well as the conditions for being removed from probation. Essentially this says that we’re counting on you to do what you agreed to do three weeks ago. I need you to sign this copy for your file; I’ll give you a copy to take with you. When you successfully complete the terms outlined here, we’ll remove the copy from your file.”

Terry indicated where Fred was to sign.

Thirty Days Later

Most people will do what they are supposed to do. Some people won’t. Fred didn’t, but there’s no need in going into detail about that.

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