

Coaching Needs Analysis

- **Individual Activity**

- Make a list of the Top 3 areas where you need to spend the most time coaching your salespeople to increase sales of the new truck
- Consider the entire sales cycle
 - Territory analysis and strategic prospecting
 - Time and territory management
 - Using the new Streaming E-Mail to generate leads
 - Consultative qualifying techniques
 - Selling value vs. explaining features and benefits
 - Using the new Multimedia Sales Tool with customers
 - Writing consultative proposals
 - Overcoming objections and selling vs. the competition
 - Closing the sale
- Then, we'll share your coaching priorities with the group

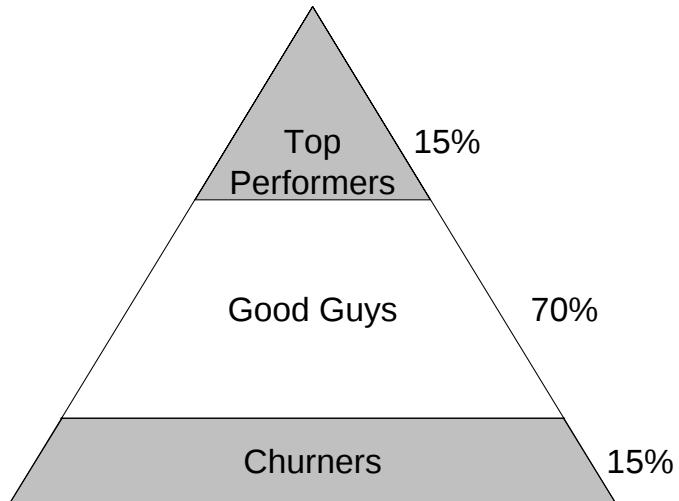
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My Top Priority Coaching topic is _____

My Second Priority Coaching topic is _____

My Third Priority Coaching topic is _____

Three Types of Salespeople



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How to Change Sales Behavior

- **Five steps to change behavior**

- Communicate Your Vision and Expectations
 - Provide Training and Support
 - Actively Coach the Fact-Based Selling Model
 - Use Motivational Leadership
 - Recognize and Reward Desired Behavior
- 



- Let's look at each step in detail

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Step 1 – Communicate Your Vision and Expectations

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Ways to Communicate your Expectations

- **Group meeting with your sales team**

- Conducted by Sales Champion and Dealer Principal
- Summarize expectations for the entire sales team
- Reinforce desired behaviors



- **Individual discussions with each Sales Rep**

- Include both the Sales Champion and Dealer Principal
- Discuss individual expectations in detail
- Identify specific areas for behavior change

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Tips for Communicating Expectations

- **Discuss expectations face-to-face (vs. phone or e-mail)**
- **Focus on four aspects**
 - What needs to change
 - Benefits of changing (to the sales people)
 - What support you will provide
 - When the changes must be accomplished
- **Summarize your expectations in writing**
 - Reminds the Sales Rep of what's expected
 - Job description, meeting summary, letter, etc.

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Identifying Your Expectations

- **Individual Activity**

- Think about your Top 3 expectations for your Sales Reps, regarding selling the new Fortis™ truck
- For each expectation, answer the following questions:
 - What do my Sales Reps need to do differently?
 - Why are the changes beneficial to each Sales Rep?
- Then, we'll share our ideas with the group

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Expectation number 1

Expectation number 2

Expectation number 3

Communicating a Sense of Urgency

- Identify specific dates for completion
- Attitude of Sales Champion and Dealer Principal are critical
 - Emphatic
 - Energized
 - Excited
 - Positive
- What you say is as important as how you say it



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Action Plan – Part 1

- **Individual Activity**
 - Turn to Action Plan – Part 1 (behind “Resources” tab) and identify the following:
 - Identify a date to create a “Sales Consultant” job description
 - Identify a date for writing the “Changes” your Sales Reps need to make in order to become Sales Consultants
 - Identify how you want to communicate your “Expectations” to the sales staff
 - Identify a date for communicating your “Expectations” to all Sales Reps.

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Step 2 – Provide Training and Support

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Training on your Value Proposition is Critical

- **Group Discussion**
 - What is a value proposition, and why is it critical to success?
 - What did you identify for your value proposition, in the Pre-Launch Preparation Assignment?



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- What is a value proposition, and why is it critical to success?
- What did you identify for your value proposition, in the Pre-Launch Preparation Assignment?

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Key Training Elements

- **Reinforcement training to build comfort with the truck**
 - Pilot Truck Orientation
 - Lee Tracy DVD
 - Value Discussion
- **Skills training to communicate desired sales behaviors**
 - Prospecting module
 - Follow-up Streaming E-Mail modules
- **Let's look at each training element in detail**

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Reinforcement Training

- **Pilot Truck Orientation**
 - Complete after your Pilot truck arrives
 - Led by Sales Champion
 - Session includes the following segments:
 - Sales Reps drive the truck
 - Review key features and innovations
 - Reinforce key selling messages
 - Discuss the unique value offered by the new truck
 - Training materials
 - Participant Workbook from Launch Meeting
 - New Brochure



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A yellow school bus is shown in the bottom right corner of the slide. It is a modern, boxy model with a large black wheel and a black door. The bus is facing towards the right.[illegible]

Reinforcement Training

- **New Innovations / Sales Certification Test**
 - Led by Sales Champion
 - Session includes the following segments:
 - Watch the Lee Tracy DVD as a group
 - Review changes and innovations to truck systems
 - Discuss key advantages vs. the competition
 - Reinforce the value offered by the new truck
 - Training materials
 - Lee Tracy DVD received at Launch meeting

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- Session includes the following segments:
 - Watch the Lee Tracy DVD as a group
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 - Reinforce the value offered by the new truck
- Training materials
 - Lee Tracy DVD received at Launch meeting

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Reinforcement Training

- **“Selling Value” Training Session**
 - Led by Sales Champion
 - Session includes the following segments:
 - Discuss how to demonstrate value to customers
 - Review why the new Fortis™ truck delivers superior value
 - Practice using the Multimedia Sales Tool to demonstrate value to the customer
 - Training materials
 - Participant Workbook from Launch Meeting
 - New Multimedia Sales Tool
 - New Brochure

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- Led by Sales Champion
- Session includes the following segments:
 - Discuss how to demonstrate value to customers
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Selling Skills Training

- **Prospecting Training Session**

- Led by Sales Champion
- Session includes the following segments:
 - Discuss strategic prospecting techniques
 - Identify target accounts for the new Fortis™ truck
 - Create a Sales Action Plan to guide prospecting activity
- Training materials
 - Prospecting Action Guide
 - Leader's PowerPoint Slides



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Selling Skills Training

- **7 Follow-up Streaming E-Mail Modules**

- Self-study training for Sales Reps / Sales Champions
- Delivered via Streaming E-Mail every 30-60 days
- After each module, Sales Champion leads a meeting to reinforce key messages
- Each follow-up module includes the following:
 - Skills and techniques to maximize lift truck sales
 - Audio “Best Practices” from top Dealer salespeople
 - Online quiz to confirm understanding and completion
 - Materials for leading a coordinated sales meeting
- Training materials
 - Sales meeting materials in each Streaming E-Mail

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Sales Certification Test

- **Web-based Self-Test**
 - Certifies your sales team to sell the new truck
 - Required for all Sales Reps / Sales Champions
 - Access test online at:
http://204.118.153.11/salestraining/HY/quiz/Fortissalescertification/Fortis_certification.htm



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- Certifies your sales team to sell the new truck
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Action Plan – Part 2

- **Individual Activity**
 - Turn to Action Plan – Part 2 (behind “Resources” tab) and identify the following:
 - What are your goals, target dates, locations and time required to:
 - Accomplish the Pilot Truck Orientation training
 - Accomplish the Innovations / Sales Certification Test training
 - Accomplish “How to Sell Value” training
 - Accomplish Creating Strategic Prospecting Actions Plans training

**Step 3 –
Actively Coach the
Fact-Based Selling Model**

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Coaching vs. Counseling

- **Coaching**
 - Analyzing the performance of a Sales Rep
 - Discussing areas for improvement
 - Improving weak skills and reinforcing desired behavior
 - Building “sales muscle”
- **Counseling**
 - Asking good questions and listening
 - Addressing an individual's problems and concerns
- **Coaching is building skills vs. solving problems**

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Why Do We Coach?

- All Sales Reps need coaching

- Coaching is critical to improving selling skills
- Everyone benefits from observation, analysis and suggestions for improvement

- **Coaching is a Sales Champion's most-important job**

- You're the only person focused on building stronger Sales Reps
- This should be the first item on your job description

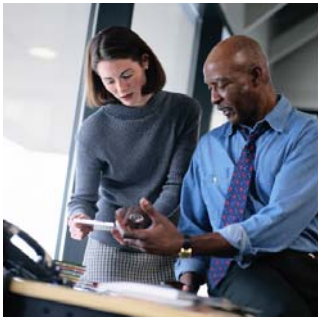


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What Do We Coach?

- **The purpose of coaching is to improve selling skills**
- **Focus on the steps in the Fact-Based Selling Model**
 - Prospecting
 - Qualifying
 - Presenting Value
 - Handling Objections
 - Closing



A photograph showing a man and a woman in business attire. The man, on the right, is wearing a blue shirt and a patterned tie, and is holding a small object (possibly a pen or a small device) while looking at it. The woman, on the left, is wearing a grey sweater and is looking down at a document or folder on the desk. They appear to be in a professional setting, possibly a sales or coaching session.

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Where Do We Coach?

- **Group Sessions - Sales Meetings**
 - All sales meetings should include coaching
 - Reinforce specific selling skills
 - Share “Best Practices” within the sales team

- **“Work-with” sessions**
 - Sales Champion makes joint calls with each Rep
 - Review objectives before each call
 - Observe the Rep during the call
 - Coach the Rep in areas for improvement
 - Provide follow-up reinforcement

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When Do We Coach?

- **Coaching is a “pre-planned” activity**
 - Plan coaching activities at least one week in advance
 - **Focus on one selling step for each coaching session**
 - **Tips for “Work-with” sessions**
 - Discuss the selling step you will focus on that day
 - Review Sales Rep’s objective for every call
- 
- A photograph showing a man and a woman, likely a sales representative and a coach, looking down at a document or laptop screen together. The man is on the left, wearing a suit and tie, and the woman is on the right, with short grey hair. They appear to be in a professional setting, possibly a meeting or training session.



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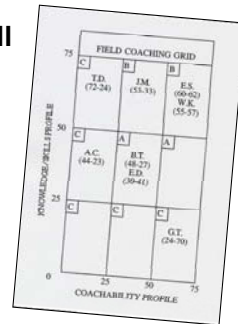
Prioritize Your Coaching Time

- **Carefully plan your coaching efforts**
 - Determine the time you have available for coaching
 - Identify the “payoff” you can achieve by working with your most-coachable Sales Reps
 - Allocate your coaching by the expected return on your time
- **Create a “Coaching Profile”**
 - Turn to the Coaching Profile Worksheet (behind “Resources” tab)
 - Evaluates knowledge / skills and coachability
 - Complete the assessment for each Sales Rep
 - Total the score for each page (at bottom)
 - Note: Make copies of this page to complete for each Rep

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- Turn to the “completed” Field Coaching Grid
- Plot scores from the Coaching Profile
 - Knowledge / skills on vertical axis
 - Coachability on horizontal axis
- Example – B.T. (48-27) in center cell
 - Knowledge / skills = 48
 - Coachability = 27



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- Cell labels (A, B or C) identify coaching priority

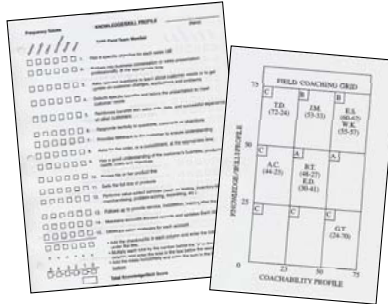
- **Note: Treat new Reps as “As” until beyond rookie stage**

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Tools for Prioritizing Coaching Time

Discussion Question

- Does everyone understand how to prioritize coaching time using the Coaching Profile worksheet and Field Coaching Grid?



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Tips for Effective Coaching

- **Five parts of an effective “Work-with” session**

Part 1 – Plan the coaching visit

Part 2 – Conduct a pre-call briefing

Part 3 – Observe the call

Part 4 – Conduct a coaching conference (after the call)

Part 5 – Provide follow-up reinforcement



- Let's look at each part of a "Work-with" session in detail

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Work-with Part 1 – Plan the Coaching Visit

- **Meet with the Sales Rep at the beginning of the day**
- **Discuss your objectives**
 - Observe selling skills
 - Identify opportunities for improvement
 - Provide training / support to improve skills
 - NOT a performance evaluation
- **Review the schedule for the day**
 - Which accounts will you call on?
 - What is the status of each account?

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Work-with Part 2 – Conduct a Pre-call Briefing

- **Discuss the following before each call:**
 - What is the account's status?
 - Who are you meeting?
 - What is the Rep's objective for the call?
 - What challenges does the Rep expect?
- **Reinforce your role as an observer**
 - Sales Rep leads the meeting
 - Sale Champion is there to observe
 - Don't "take over" the call
 - Be careful not to undermine the Rep's credibility



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Work-with Part 3 – Observe the Call

- **Quietly observe the Sales Rep's performance**

- You may choose to take notes
- Assess the Rep's selling skills
- Look for strengths and positive behaviors
- Identify areas for improvement
- Evaluate the Rep's focus on achieving the call's objective



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Work-with Part 4 – Conduct a Coaching Conference

Eight steps for an effective Coaching Conference

- Step 1 – Reinforce positive behavior**
 - Begin with a positive statement to build confidence
- Step 2 – Ask the Sales Rep to analyze his performance**
 - Ask the Rep to describe something he/she did well
 - Critical before discussing deficiencies
 - Reinforces positive behavior
- Step 3 – Use leading questions**
- Step 4 – Suggest improvements**

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Work-with Part 4 – Conduct a Coaching Conference

**Eight steps for an effective Coaching Conference
(cont'd)**

Step 5 – Elicit feedback on suggested improvements

Step 6 – Help the Rep practice new skills

- Role-plays are great for one-on-one practice

Step 7 – Gain commitment to continue improvement

Step 8 – Provide positive reinforcement

- Reinforce desired behaviors
- Build the Rep's confidence to continue working hard

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Work-with Part 5 – Provide Follow-up Reinforcement

- “Inspect what you expect”
- Offer encouragement
- Reinforce importance and benefits of adopting new behaviors
- Summarize ideas in writing
- Praise the Sales Rep in front of peers
- Ask the Rep to share positive experiences with the sales team



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Action Plan – Part 3

- **Activity**
 - Turn to Action Plan – Part 3 (behind “Resources” tab) and identify the following:
 - Identify a date to complete a Coaching Profile for each Sales Rep and complete your Coaching Grid
 - Which Rep is your highest priority to complete a “Work-With” coaching session
 - Identify dates for completing “Work-With” sessions for all of your Sales Reps

Step 4 – Use Motivational Leadership

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Lead by Example

- **Webster's defines Leadership – Showing the way by going before"**
- **Group Discussion**
 - What techniques can you use to "lead by example"?
 - What "Best Practices" can you share on leadership?



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Conduct Frequent Performance Reviews

- Conduct reviews at least every three months
- Facilitate review process using the job description
- The best reviews are two-way evaluations
 - Sales Champion evaluates Rep's performance
 - Sales Rep evaluates Champions' support
- Identify Rep's strengths and areas for improvement
- Agree on an Action Plan to move forward
- Put the Action Plan into writing after the review

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Action Plan – Part 4

- **Activity**
 - Turn to Action Plan – Part 4 (behind “Resources” tab) and identify the following:
 - List the actions you will take to “Lead by Example”.
 - What obstacles must you overcome to change the behaviors of your Sales Reps to be true “Consultants” and how will you overcome these obstacles
 - When and how often will you conduct Performance Reviews with your Sales Reps

**Step 5 –
Recognize and Reward
Desired Behavior**

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Celebrate Short-term Wins

- **Rule of thumb – Measure Results...Manage Behaviors**
- **Group Discussion**
 - What types of behaviors should you celebrate?
 - What “Best Practices” can you share on celebrating short-term wins?



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What Motivates Sales Reps?

- **Recognition of success**
 - Praise Sales Reps in front of their peers
 - Establish a peer-recognition program
- **Closing the sale / getting the order**
 - Celebrate closed sales during team meetings
 - Create a “success board” and post sales
- **Succeeding with new techniques**
 - Learning a “Best Practice” technique and implementing it to achieve success



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What Motivates Sales Reps?

- **Financial rewards**
 - Sales Reps are motivated by money
 - Consider gift certificates, game tickets, trips, etc.
- **Including spouses / partners in reward activities**
 - Sales Reps enjoy including their partners in reward activities
 - Consider dinners, events, trips, etc.

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Reward Strategies

- **Group Discussion**

- What types of non-monetary rewards have you found effective?
- What “Best Practices” can you share regarding successful reward strategies?



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Communicating Successes

- **Group Discussion**

- How can you effectively communicate successes throughout your sales organization?



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Action Plan – Part 5

- **Activity**
 - Turn to Action Plan – Part 5 (behind “Resources” tab) and identify the following:
 - What “Recognition and Reward” techniques will you use to encourage behavior change
 - Identify a date for implementing your Recognition and Reward techniques
 - Identify how you will communicate successes throughout your organization
