

FIVE ESSENTIAL STEPS TO AN EFFECTIVE ONE-ON-ONE

*The Single-Most Important Thing You Can Do
to Develop Your Salespeople*

FIVE ESSENTIAL STEPS TO AN EFFECTIVE ONE-ON-ONE

by Bill Zipp

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INTRODUCTION

FIVE STEPS FOR AN EFFECTIVE SALES ONE-ON-ONE

It's the single-most important thing you can do to develop your salespeople.

It's the difference between consistently hitting a goal, and missing it every other month (or more). It's the difference between building a team of strong, capable professionals, and the revolving door of sales personnel most companies struggle with.

What is it? Conducting consistent, effective one-on-one meetings with your salespeople.



The problem is, no one tells you how to have these meetings. They just insist that you do. Worse yet, no one one really wants to have them either.

A head of sales I worked with once said, "There are two kinds of people in a sales organization who hate having one-on-one's. Sales managers and sales representatives."

Guess what? That's everybody.

If you're the head of sales, this is bad news. When people hate the single most important thing they can do to develop your sales reps, they'll use any excuse to avoid it, or do the bare minimum to check it off their list.

If you're a sales manager, this is bad news too. In your gut you know you should have regular one-on-one's, not to get your manager off your back but because they'll make a really big difference in the success of your team. You just don't know how.

Over the last 20 years of sales leadership, I've conducted thousands of one-on-one's with salespeople and sales managers alike. As a sales consultant, I've sat in on other leaders' one-on-one's and debriefed the meetings with them afterwards. Over this time I've developed a proven process to complete this critical task.

Keep reading for the five essential steps for an effective sales one-on-one.

STEP ONE

THE AGENDA

Regular one-on-one meetings between a sales representative and his or her sales manager should be focused on one thing and one thing only: goals.

This meeting is not a time for deal reviews, which are best done with the entire team so everyone can learn from the review, pipeline management, forecasting, or strategic account development, all best done with the entire team as well (or the occasional one-off).

Neither is this a time for corrective action. When corrective action needs to take place, as it sometimes does, it should be done outside of the regular one-on-one, so a sales rep knows exactly what to expect whenever they meet with you. No surprises.

Goals, that's the agenda of an effective sales on-on-one. Don't be fooled, however, by the simplicity of that word, because there are two distinct kinds of goals to focus on in these meetings: performance goals and process goals.

A few years ago I ran my first half marathon. I set a target time of two hours and fifteen minutes and hired a coach to help me hit it. My coach created a weekly workout plan that involved long runs and short runs, tempo runs and intervals, all with specific times and distances.

The target of two hours and fifteen minutes was my performance goal, similar to a sales person's quota for the year, the workout plan was a set of process goals that

transformed me into a half marathon runner who could meet or exceed my performance goal, which I did six months later.

As a sales coach, your job is to focus your salespeople on both of these goals as well. There's quota, the total sales target they are trying to reach for the year, quarter, or month, and there's the specific weekly activities they need to do to reach it, like number of outbound calls made, first appointments set, executive overviews presented, and proposals submitted.

Performance goals and process goals, each of these feed and fuel the other, producing exceptional results. This is the agenda for all your one-on-one sales meetings.



PERFORMANCE GOALS AND PROCESS GOALS

PERFORMANCE GOALS	PROCESS GOALS
Total sales by month, quarter, year	Sales activities by day, week, month
<i>Accomplished and re-set each year</i>	<i>Repeated over and over again</i>
What your salespeople need to achieve	How your salespeople will be able to achieve it
<i>Target marathon time</i>	<i>Weekly running workouts</i>

STEP TWO

THE FLOW

The really good news about having regular sales one-on-one's is this: they follow a simple structure—banks on the river, so to speak—that allow the meeting to flow from one phase to the next. The outline for this flow is easy to remember and easy to follow.

First, talk about progress. Progress on what? Progress on a rep's performance goals and process goals. The focus in this part of the meeting is on past performance and sets the trajectory for the rest of the meeting. If you're having a sales one-on-one like this for the very first time, work together on defining performance and process goals, then every meeting after this one start by checking in on progress related to them.

Then talk about plans. The focus in this part of the meeting is not on the past but the future. That is, given the progress they've achieved related to their goals, what are they going to do in the next few weeks to maintain that progress, or even expand on it.

Don't let this part of the conversation become broad and generic. Drill down to identify tangible, measurable steps of action to take in the immediate future to continue to make goal progress. Every week my running coach had a specific number of miles she wanted me to run with set times to hit my half-marathon goal. Success in sales requires the same.

Next the meeting shifts to the present, as in right now what problems are getting in your way and how are you

doing personally? Find out what you can do to remove any obstacles that may exist in this person's sales world and listen intently to what's going on in their personal world.

A slight variation of this order occurs when you have a salesperson who's highly relational. He or she may not be able to adequately discuss past progress or future plans until they've told you how they're doing personally. If that's the case—and in my experience about a third of the time it is—I start with how they're doing personally and then move to progress, plans, and problems.

I give this counsel with a warning, however. If you, too, are highly relational, and you start with how your people are doing personally, it's entirely possible to burn up fifteen minutes or more talking about last week's soccer match or an upcoming birthday party. That's not the point of this portion of the meeting. It's simply to stay checked-in with each other's life. If more time is needed, go to the pub after work. Finally, I never start with problems, although I always reserve time to talk about them. It just sets things off in a negative direction.

How long should a meeting like this go? Forty-five minutes. That's it. I've followed this flow thousands of times, and find with a regular weekly one-on-one (See: STEP FOUR below) I can wrap things up at about a quarter till the hour, capture salient points in my journal, stand up, go for a short walk, and be ready for the next meeting at the top of the hour.

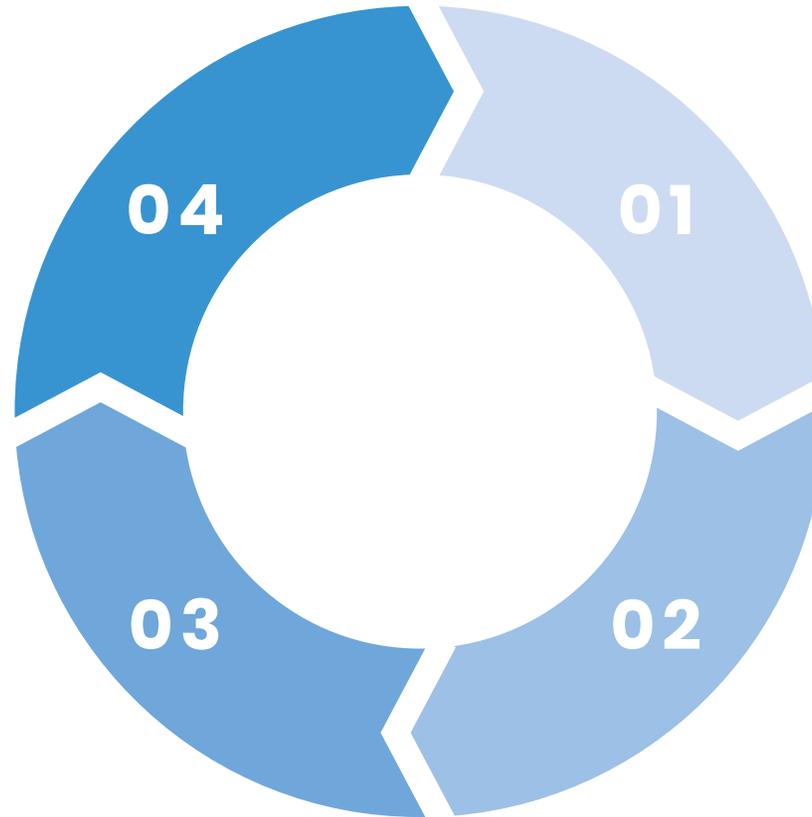
FRAMEWORK

ONE-ON-ONE MEETING FLOW

PERSONALLY

The focus here is on the *present*

PROBLEMS



PROGRESS

The focus here is on the *past* and the *future*

PLANS

STEP THREE

THE CONVERSATION

It's critically important to understand, as you work through the flow of a one-on-one from the past to the future and the present, that this meeting is a conversation, and a conversation involves both parties speaking and listening.

The biggest mistake I made as a new sales manager was dominating the discussion in my one-on-one's. I observe this same mistake being made as well whenever I sit in on one-on-one's during a sales consulting project. Here's a typical post-meeting debrief:

"How do you think that one-on-one went?"

"Okay, I guess," a sales manager says.

"Who did most of the talking?" I ask.

"Oh ... I did."

"How much? 80%? 90%? 100?" I probe.

"Not 100%," he or she laughs uncomfortably.

"Probably 80-90%."

"So, if you're doing 80-90% of the talking in your one-on-one's, how much do you think your salespeople are getting out of them?"

"Not much," is usually the honest reply.

Remember this: in a sales one-on-one, the person doing the talking is doing the learning. Who does most of the learning in your one-on-one's? You or your salespeople?

Engaging in a robust conversation, then, means showing up with an inquisitive mind and asking open-ended questions designed to help your sales reps think for themselves. Ask them once, ask them again in another way, and repeat the words, "Tell me more ..." over and over.

This doesn't mean that you stop speaking entirely in a sales one-on-one. You've got a lot of helpful advice and useful experience to share. Just monitor your input and make sure meetings with your salespeople are truly collaborative. Learn when to lean in and have your say, and when to back off entirely and let the silence speak. Less is more here.

Finally, I'd like to remind you that critical to any good conversation is being fully present in it. Under no circumstances should you allow email, texts, phone calls, or anything else distract you in this time. Silence your phone and turn off all notifications on your computer. If you're conducting a one-on-one remotely, always have the video camera on in both locations.

Multitasking is okay if you're watching a football game and folding the laundry. It doesn't matter if you mismatch your socks or miss an interception. It does matter when you miss a subtle emotional cue from a sales rep who's struggling because you were reading an incoming text.



Coaching is the single most important part of expanding others' capabilities. It's the difference between giving orders and teaching people how to get things done. Good leaders regard every encounter as an opportunity to coach.

LARRY BOSSIDY AND RAM CHARAN

*Execution: The Disciplines
of Getting Things Done*



STEP FOUR

THE CADENCE

After the question, “What should I do in a sales one-on-one?”, the most frequent question I get about them is, “How often should I have them?”

I won't answer that question like a typical consultant, as in, “It depends.” Over the years I've come to see that the best cadence for sales one-on-one's is once a week. Here's why I believe that.

Most everything in sales has a 30-60 day echo effect. That is, if you uncover a problem and resolve it, that resolution won't impact sales results for another 30-60 days. Meeting once a month is too infrequent not to have that math work against you, especially if a meeting gets missed for some reason.

This echo effect is why I don't recommend every other week one-on-one's either. Every other week meetings can inadvertently slip into once a month meetings with a sick day, vacation day, or a scheduling conflict, and you'll find yourself, again, with a month—if not a whole quarter—lost. Many a quota has been missed due to one bad month.

For more seasoned sellers, if we've made all our one-on-one's, I'll often cancel the last meeting of the month

and let them focus on closing deals, conducting three meetings with them in a month rather than four. For less seasoned sellers, I'll use that extra time to double up on meetings for a week or so, giving them extra attention.

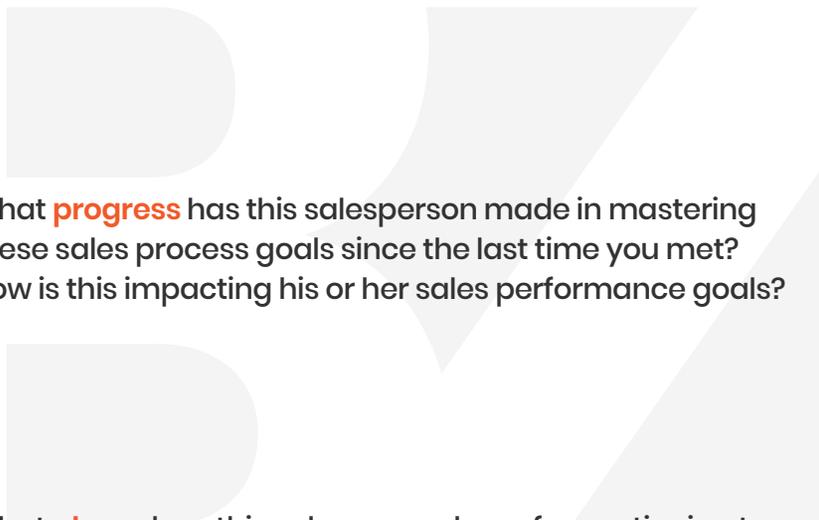
View these times in your week as you would a doctor's appointment. If you had a doctor's appointment on Friday, how would you—in your crazy-busy week—make sure you got there? You'd put it in your calendar, of course, and not let anything take its place. Treat your sales one-on-one's in the same way. They're the most important thing you do as a sales leader, and deserve to be scheduled in this protected, dare I say sacred, way.

Finally, I used to do all my one-on-one's in one day, but then I'd get to the end of the day utterly exhausted with a splitting headache. So I blocked out a morning in one part of the week and an afternoon in the other part of the week to do three or four in each block. Using the 45 minutes on and 15 minutes off pattern I recommend earlier, I began to look forward to these days instead of dreading them. You will too.

WORKSHEET

ONE-ON-ONE MEETING FLOW

Prior to a one-on-one meeting with a salesperson, complete Items 1-4 of this worksheet. During the meeting, take notes on Items 5-8. End the meeting by completing Items 9 and 10. Review this worksheet before your next one-on-one with this salesperson.

1. Salesperson:
2. Meeting Date and Time:
3. Next Meeting Date and Time:
4. What are 3-4 specific sales process goals this salesperson is working on right now?

5. What **progress** has this salesperson made in mastering these sales process goals since the last time you met? How is this impacting his or her sales performance goals?
6. What **plans** does this salesperson have for continuing to master these sales process goals? How will this impact his or her sales performance goals?
7. What **problems** are getting in the way related to mastering these goals or anything else in this person's sales world?
8. How is this salesperson doing **personally**?
9. What steps of action do you need to take as this salesperson's manager based on these discussions? When will these steps of action be completed?
10. What steps of action does this salesperson need to take based on these discussions? When will these steps of action be completed?

STEP FIVE

THE FOLLOW-THROUGH

I hate running on a treadmill. I've tried it, and it doesn't work for me. Mostly because it's so unfulfilling. No matter the fancy screen or the dramatic video that's playing, I always feel like I'm going nowhere. Give me point A to point B any time, even with our cold Northwest winter rain.

Apart from consistent follow-through, this is exactly what a sales one-on-one feels like: a treadmill going nowhere, recycling the same issues over and over again and repeating the same talk tracks over and over again. No growth, no progress, no change.

So the final step in having effective one-on-one's is keeping track of your commitments in them, and that means one thing: taking good notes.

We all use CRM software because we can't remember the details of the deals we've got in the pipeline. The same is true for one-on-one's. Taking notes is a way of capturing both party's commitments so you can remember them and, most importantly, do them.

Ask your sales reps to take notes during the first half of the one-on-one on progress and plans. That is, have them summarize your discussions related to past development on their goals and the specific steps of action that comprise their future plans. Then ask them to send these notes to you.

They can do this by taking a picture of the things they've written down during the meeting or send you a copy of what they wrote down afterwards via email. Either way, you get to see if their understanding of the conversation is aligned with your understanding of the conversation, and their sending it reinforces accountability.

You may also take notes of the first half of a one-on-one, but what you should really keep track of is the second half: problems that are getting in the way, what both of you can do you to remove them, and how this person is doing personally, critically important information for successful sales leadership.

I prefer to take takes notes in these meetings with pen and paper in a journal, which allows me to maintain eye contact and keeps me from digital distractions on my computer. That may not be your cup of tea. That's okay. Just have a system that works for you without fail. There's nothing more discouraging than pouring out your heart to your sales manager and the next week having to do it all over again because he totally forgot what you said.

Don't be that manager!

When it's time to have another one-on-one, just pull out these notes and start there. The last meeting's plans become this meeting's progress, and updates are given on present problems and personal developments. Simple.

CONCLUSION

THIS IS A FOOTBALL

The legendary Vince Lombardi, who built the Green Bay Packers into a perennial powerhouse and won back-to-back world championships, began each season with these words, “Gentlemen, this is a football!”

Ah yes, the basics. One should never forget them, for they are exceedingly important and utterly foundational.

That’s what having regular one-on-one meetings with your salespeople is: exceedingly important and utterly foundational. But woefully neglected by most sales

leaders and, in some sales organizations, completely ignored.

My challenge to you is: become an expert at this. Focus sharply on its agenda, learn its flow, master its communication, keep its cadence, and maintain consistent follow-through. Doing so will yield the rich reward of above goal performance year after year and team members who’ll be completely loyal to your leadership.



BIO

ABOUT BILL ZIPP

Bill Zipp equips busy sales leaders—CEO’s, heads of sales, and frontline managers—to motivate and mobilize salespeople to reach their goals and multiply that success repeatedly.

He brings over 20 years of experience in sales leadership and consulting to accelerate sales in high-growth companies and agile start-ups, as well as established businesses that have hit a sales growth plateau.

Bill’s sales background is in commercial radio where he was the fastest account executive in his company to reach one million dollars in sales. As head of sales, Bill’s team nearly doubled their direct sales revenue.

Bill has spent thousands of hours working with hundreds of sales leaders around the world, from ADP to WebEx, Cisco Systems to Concur Technologies. Many of the companies he’s worked with have experienced dramatic revenue growth, some even doubling and tripling annual sales.

Bill lives in Corvallis, Oregon, home of Oregon State University and the beloved orange and black of the Oregon State Beavers. He’s married to Denise and has three amazing adult children: Beckie, Ricky, and Renee.

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