

Sales Coaching Mastery

with Situational Sales Leadership

Nintex Sales Leader Development

February 2024





My Spin Studio

- Did all the classes by herself and quickly burned out
- Multiplied herself by training other spin class leaders
- Business expands to 100's of members and opens other studios

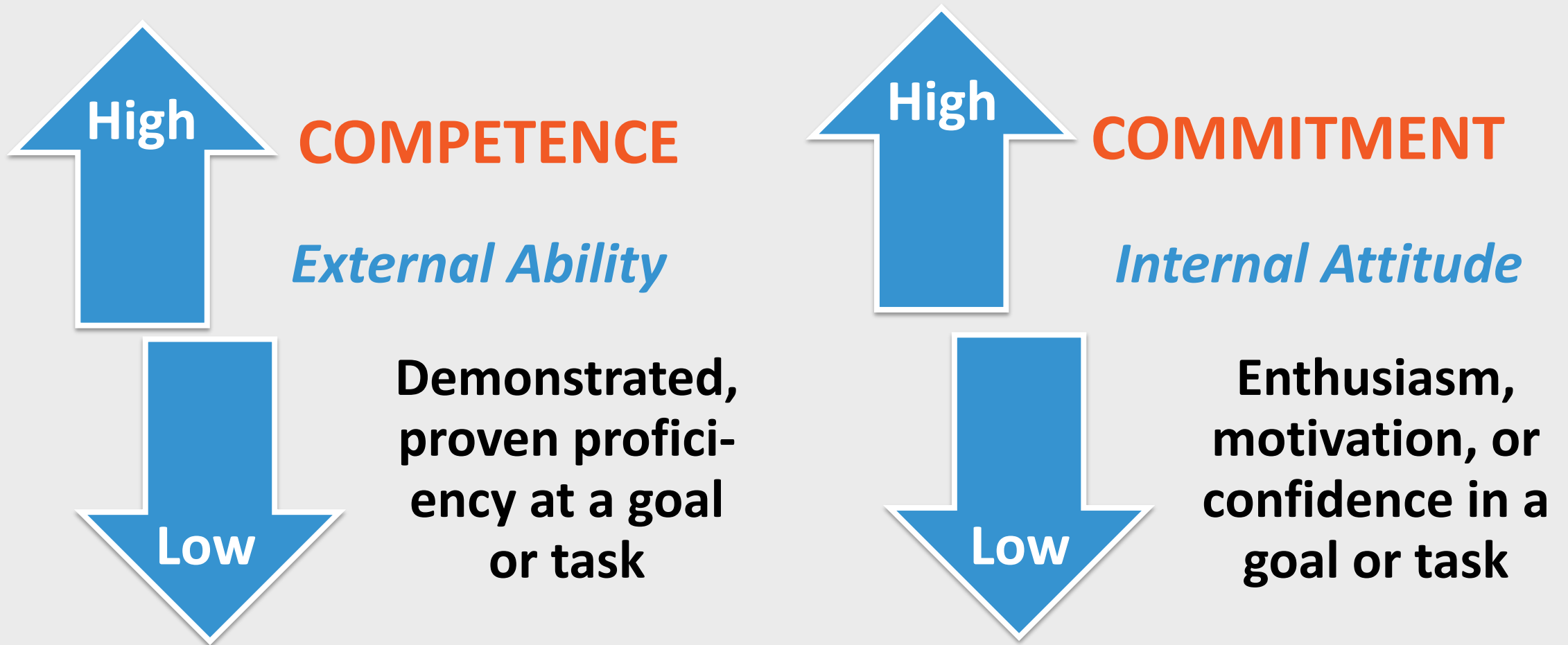
Sales Leadership *as a Spin* Studio

- New sales managers, and some seasoned ones, make this big mistake: they try to be involved in as many deals as possible. *This leads to burn out!*
- Successful sales managers multiply themselves in others, investing in rep development, because rep development drives deals and scales sales.
- Rep development is a process that takes time and requires a sales manager to become an exceptional sales coach. *This is your highest priority!*
- Your career trajectory is entirely dependent on being able to develop all the sales reps on your team, not closing deals yourself.



**Situational Sales
Leadership: A
Template for Sales
Coaching Success**

STEP ONE: Assess Development





D1

**Low Competence
and High
Commitment**

Inexperienced
Eager
Enthusiastic
Optimistic

***Don't know what
they don't know***



D2

**Low to Some
Competence and
Low Commitment**

Frustrated
Discouraged
Overwhelmed
Confused

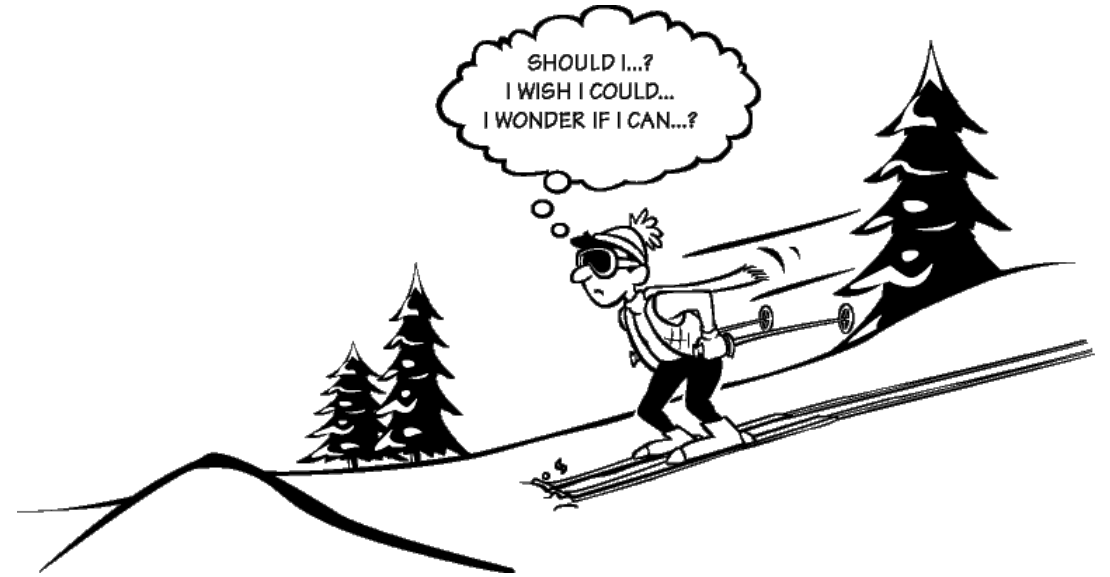
***Yet with flashes of
competence***

D3

**Moderate to High
Competence and
Variable
Commitment**

Capable but ...
Cautious
Productive but ...
Tentative

***No confidence in his
or her competence***



D4

**High Competence
and High
Commitment**

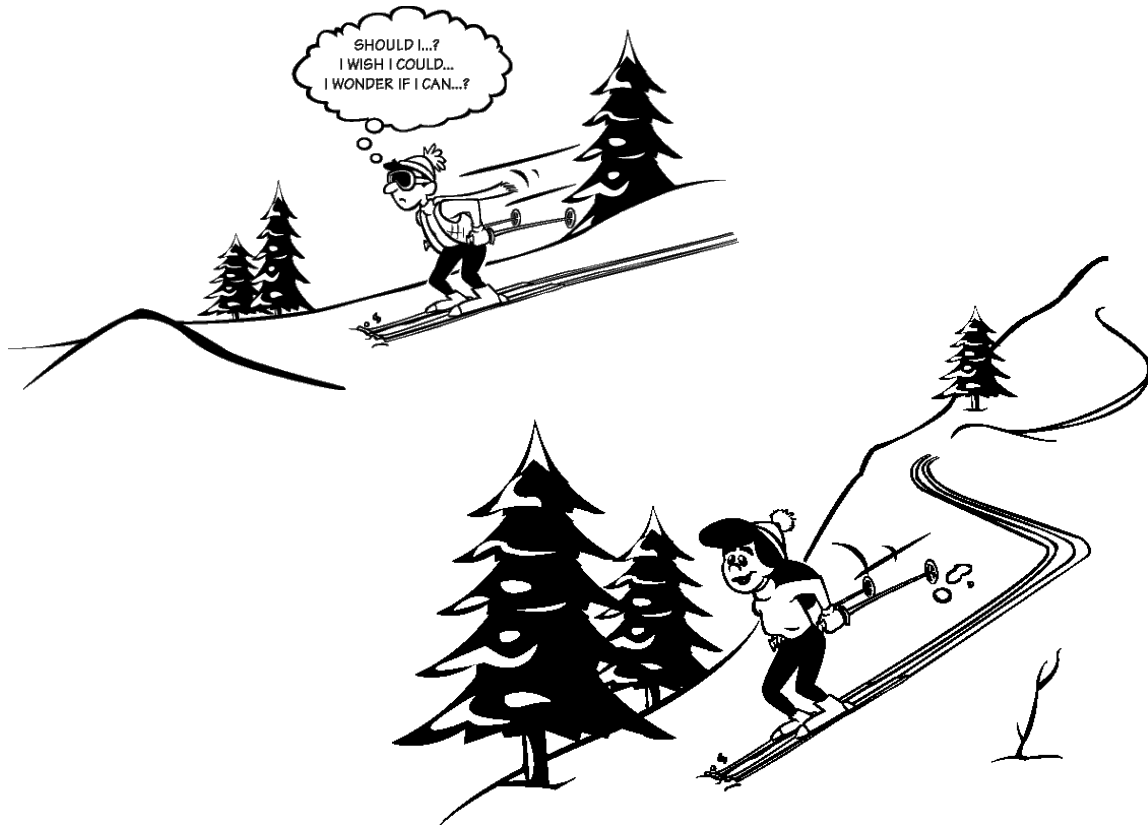
Consistent
Confident
Inspired
Independent

*If not challenged,
may get bored*



Situational Sales Leadership DEVELOPMENT

COMPETENCE



Task specific:

- Demonstrated ability
- Proven proficiency
- Transferrable skills

Situational Sales Leadership DEVELOPMENT

COMMITMENT



Task specific:

- Enthusiasm
- Motivation
- Confidence

D1	D2	D3	D4
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment

D1	D2	D3	D4
<p>Low Competence and High Commitment</p>	<p>Low to Some Competence and Low Commitment</p>	<p>Moderate to High Competence and Variable Commitment</p>	<p>High Competence and High Commitment</p>
<p>Inexperienced Eager Enthusiastic Optimistic</p> <p><i>Don't know what they don't know</i></p>			

D1	D2	D3	D4
<p>Low Competence and High Commitment</p>	<p>Low to Some Competence and Low Commitment</p>	<p>Moderate to High Competence and Variable Commitment</p>	<p>High Competence and High Commitment</p>
<p>Inexperienced Eager Enthusiastic Optimistic</p> <p><i>Don't know what they don't know</i></p>	<p>Frustrated Discouraged Overwhelmed Confused</p> <p><i>Yet with flashes of competence</i></p>		

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Meet Hilary ...

Hilary is a bright, talented sales rep for a fast-growing technology company. She works hard and hits goal every year. Hilary has great client management and interpersonal skills and is known in the company as a top performer. People like Hilary, and she likes the energy a new challenge gives her. Hilary is now being asked to take on some new responsibilities to build the business and to prepare her for a sales management position for which she's been recommended.



Scenario One

What is the specific **goal** Hilary needs to complete?

What is her **competence** in completing this goal?

What is her **commitment** in completing this goal?

What is Hilary's **development level**?

Hilary has been asked to craft a new business development strategy for a very important client. She will need to put in a lot of extra time just to get it done, and she doesn't see enough of her daughter as it is. Her sales manager has told her to do the initial work on this strategy by herself, but the complexity of this task is overwhelming. She knows she does not have a good enough grasp of the client's business or current company's options in this situation. Hilary wishes she could get more information on how to complete this project.

Scenario Two

What is the specific **goal** Hilary needs to complete?

What is her **competence** in completing this goal?

What is her **commitment** in completing this goal?

What is Hilary's **development level**?

Hilary has been asked to put together a multinational team to increase her company's business with selected global accounts. This is a fabulous opportunity for her, and she's excited about it. However, she doesn't have contacts in several of the markets, hasn't ever worked internationally, and isn't sure where to start.

Scenario Three

What is the specific **goal** Hilary needs to complete?

What is her **competence** in completing this goal?

What is her **commitment** in completing this goal?

What is Hilary's **development level**?

Hilary has been asked to make a presentation to a key group of decision-makers in an account she's been working with for a long time. There's a lot of new business at stake, but Hilary knows exactly what she needs to say and feels confident about her preparation. Hilary is always at her best when she's asked to make a compelling case for her company's products and services.

Scenario Four

What is the specific **goal** Hilary needs to complete?

What is her **competence** in completing this goal?

What is her **commitment** in completing this goal?

What is Hilary's **development level**?

The VP of Sales in Hilary's company has recently instituted a new weekly sales report. Each sales rep has been asked to report on five key performance indicators every Friday. As a top performer, Hilary doesn't see any value in taking time to compile the information, although all she has to do is pull the data from the notes she's already entered into the company's sales force software. She hasn't submitted the form in two weeks and word is starting to get around that Hilary isn't doing the weekly report. The VP of Sales is concerned others will follow her lead.

Scenario Five

What is the specific **goal** Hilary needs to complete?

What is her **competence** in completing this goal?

What is her **commitment** in completing this goal?

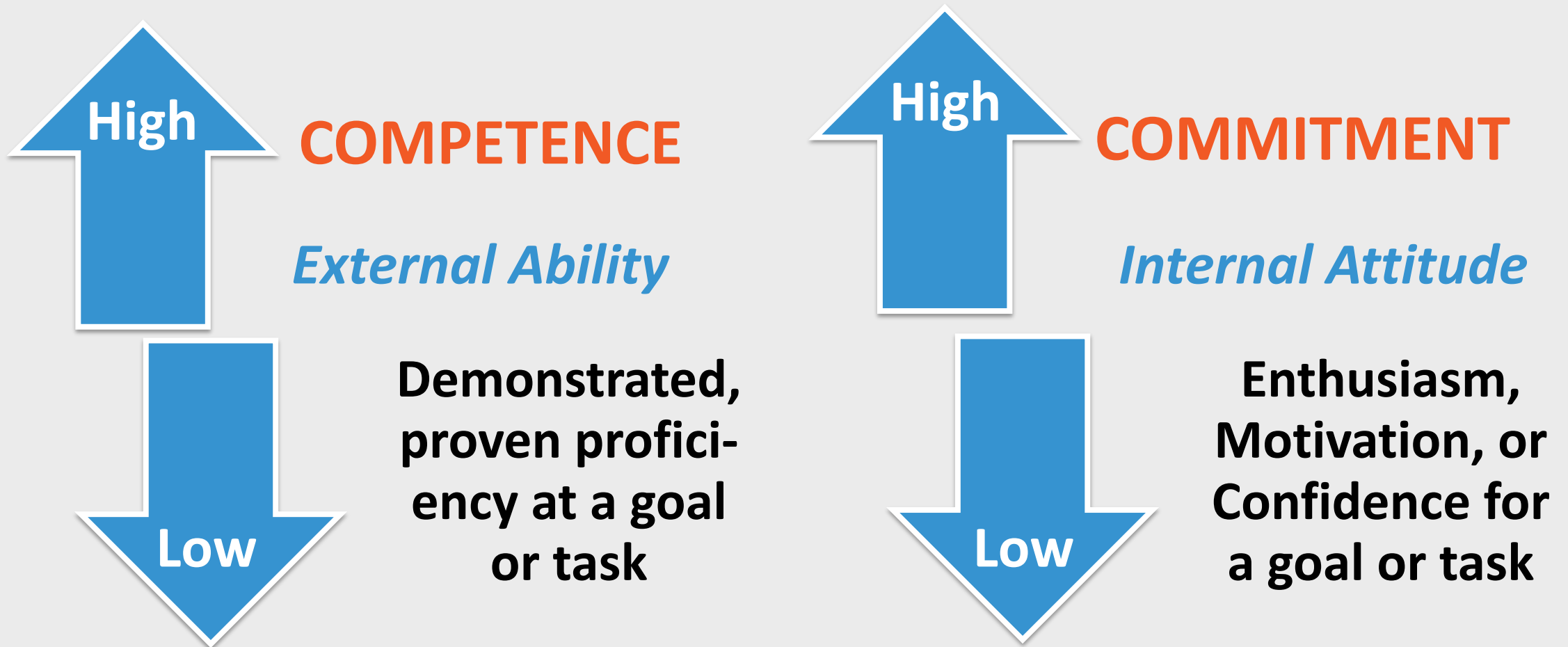
What is Hilary's **development level**?

Hilary has been asked to cut her selling expenses by 10% in order to increase profitability. She's concerned that the cuts, like last time, will have an impact on the ability to drive new business. Hilary believes she can bring in more revenue if she goes ahead with the planned expenditures. She's convinced that this is the best approach to greater profitability: increasing sales with key accounts and building new business. She has her immediate manager's support, but her manager has asked her to make the case to his manager. Hilary's nervous. What if she isn't persuasive?

What's
Wrong
with
This
Picture?



STEP ONE: Assess Development



Situational Sales Leadership STYLES

Clear expectations

Step-by-step instructions

Concrete examples

Mid-course correction

More frequent accountability

DIRECTION

Situational Sales Leadership **STYLES**

SUPPORT

Asking questions

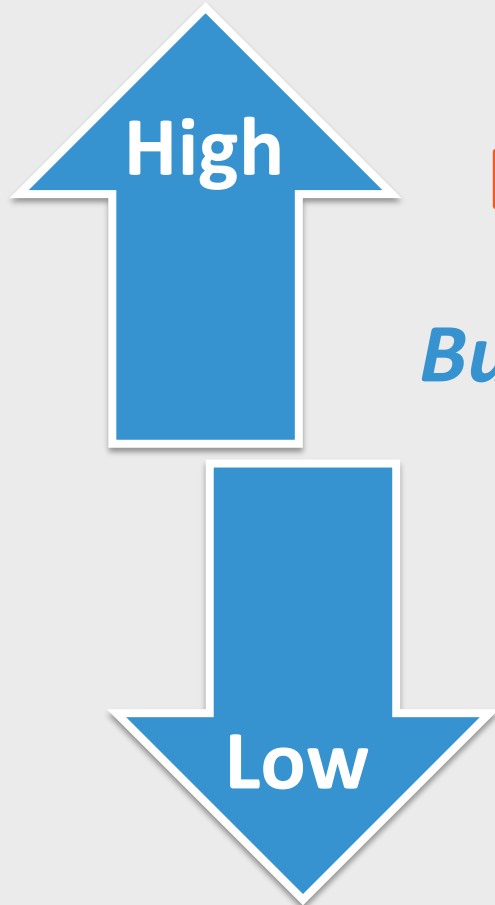
Active listening

Accurate reflection

Positive encouragement

Less frequent accountability

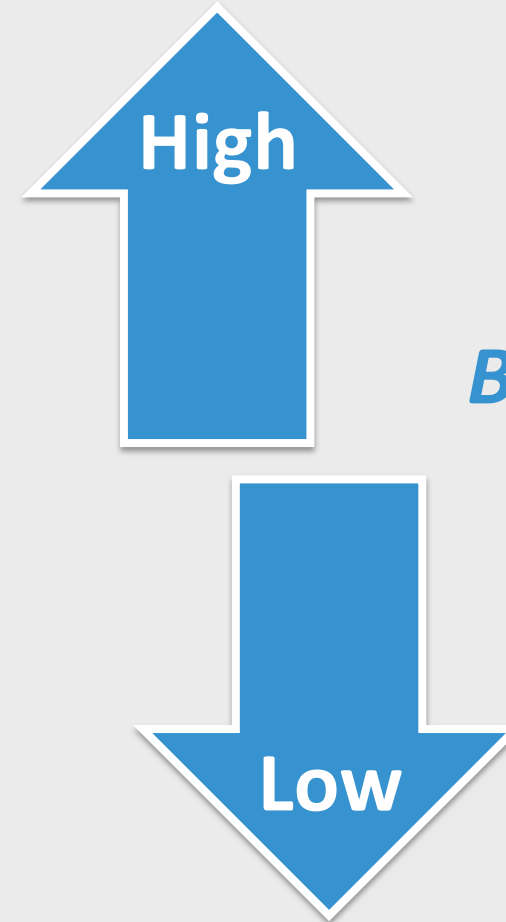
STEP TWO: Match Style



DIRECTION

Builds Competence

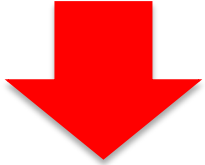

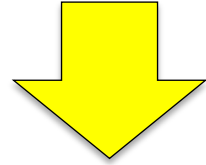

Teaching, training, correcting, and providing more frequent accountability



SUPPORT

Builds Commitment

Asking, listening, reflecting, and providing less frequent accountability

D1	D2	D3	D4
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment
			
S1	S2	S3	S4
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support

S1	S2	S3	S4
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
<p>Affirm enthusiasm</p> <p>Define success clearly</p> <p>Give concrete examples</p> <p>Teach and show HOW</p> <p>Check for understanding</p> <p><i>Check work frequently</i></p>			

S1	S2	S3	S4
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
<p>Affirm enthusiasm</p> <p>Define success clearly</p> <p>Give concrete examples</p> <p>Teach and show HOW</p> <p>Check for understanding</p> <p><i>Check work frequently</i></p>	<p>Understand frustrations</p> <p>Analyze failures</p> <p>Provide perspective</p> <p>Explain WHY</p> <p>Fill in learning gaps</p> <p><i>Check work consistently</i></p>		

S1	S2	S3	S4
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S1	S2	S3	S4
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You have asked one of your experienced sales representatives to prepare a one-hour presentation for next month's team meeting. The presentation is to compare a newly released product with a competitor's product. He is excited about presenting this data at the meeting but is having trouble understanding information about the competitor's product. The presentation outline is five days overdue.

What is the **specific goal**?

What is this person's **competence** in completing the goal?

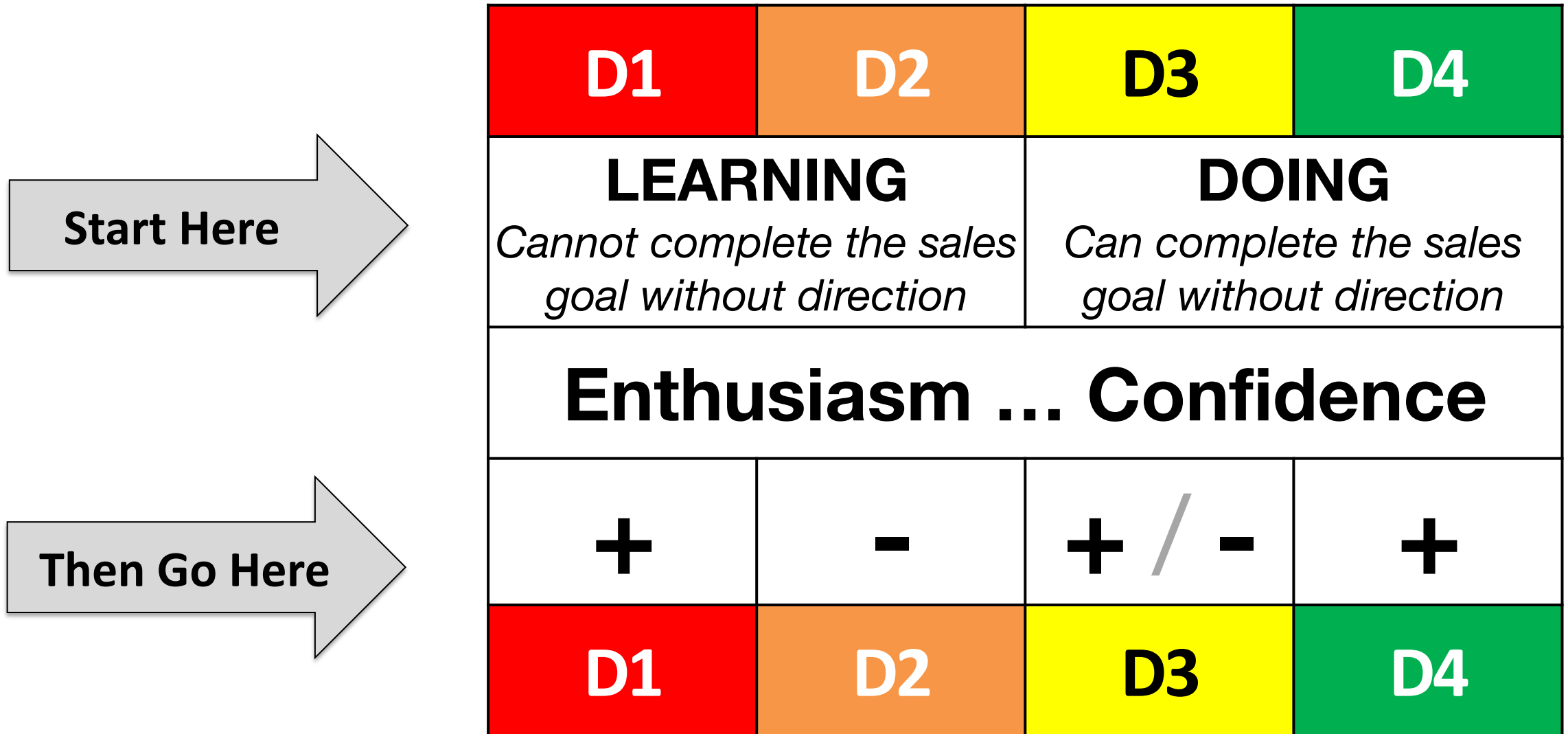
What is person's **commitment** in completing the goal?

What is his **development level**?

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- A. Express concern about the lateness of the outline but give him more time to complete the task. Set another deadline to receive the report.
- B. Ask him why the outline is late. Listen to his concerns and facilitate his problem-solving efforts to improve the presentation outline. Periodically check to see that he carries out his own ideas.
- C. Tell him that you want the presentation outline in two days. Interpret the data on the competitor's product. Show him what the outline should look like and closely monitor his work.
- D. Discuss the data with him. Solicit his input but make sure he follows your general ideas. Follow up to see if the work is being done on time.

Situational Leadership Decision Tree



One of your sales representatives is very reluctant to call on larger accounts. She thinks larger accounts take longer to sell, are harder to close, and require connecting with senior level decision makers. All things she doesn't think she's good at. While this may be true, both you and your VP of Sales know that larger accounts are important to the future of the company and to her success as a sales professional.

What is the **specific goal**?

What is this person's **competence** in completing the goal?

What is this person's **commitment** in completing the goal?

What is her **development level**?

One of your sales representatives is very reluctant to call on larger accounts. She thinks larger accounts take longer to sell, are harder to close, and require connecting with senior level decision makers. All things she doesn't think she's good at. While this may be true, both you and your VP of Sales know that larger accounts are important to the future of the company and to her success as a sales professional.

- A. Discuss how she should start calling on larger accounts. Begin to work on the prospecting skills she needs by demonstrating how to gain access to senior decision makers. Explain why this activity is so important to the company's future and include her suggestions whenever possible. Regularly check on her progress.
- B. Specify exactly how she should call on larger accounts. Begin to work on the prospecting skills she needs by demonstrating how to gain access to senior decision makers. Closely monitor her progress.
- C. Ask her to start calling on larger accounts but listen to her objections and concerns. Explain the importance of larger accounts to the company's future. Explore what encouragement from you she needs to get started. Agree on a plan to monitor progress.
- D. Ask her to call on larger accounts. Let her know that she needs to start closing deals with them and be available to help when needed. Ask to be kept informed on progress.

Follow-Up Frequency by Leadership Style

S1	S2	S3	S4
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
<i>Check work frequently</i>	<i>Check work consistently</i>	<i>Check work regularly</i>	<i>Check work occasionally</i>

Follow-Up Frequency by Leadership Style

S1	S2	S3	S4
High Direction and Low Support	High Direction and High Support	Low Direction and High Support	Low Direction and Low Support
<i>Check work frequently</i> Follow-up every day or every other day.	<i>Check work consistently</i> Follow-up every other day or every week.	<i>Check work regularly</i> Follow-up every week or every other week.	<i>Check work occasionally</i> Follow-up every other week or every month.

Each leadership style **holds team members accountable** for the completion of their goals. Differences by style lie in the **development of a team member** and the frequency in which follow-up takes place.

For the second time in a month, you are having sales documentation problems with one of your sales representatives. Her call reports have been late and incomplete. In the past year she has demonstrated timeliness and accuracy with these reports, and this is the first time you have spoken to her about the problem.

What is the **specific goal**?

What is this person's **competence** in completing the goal?

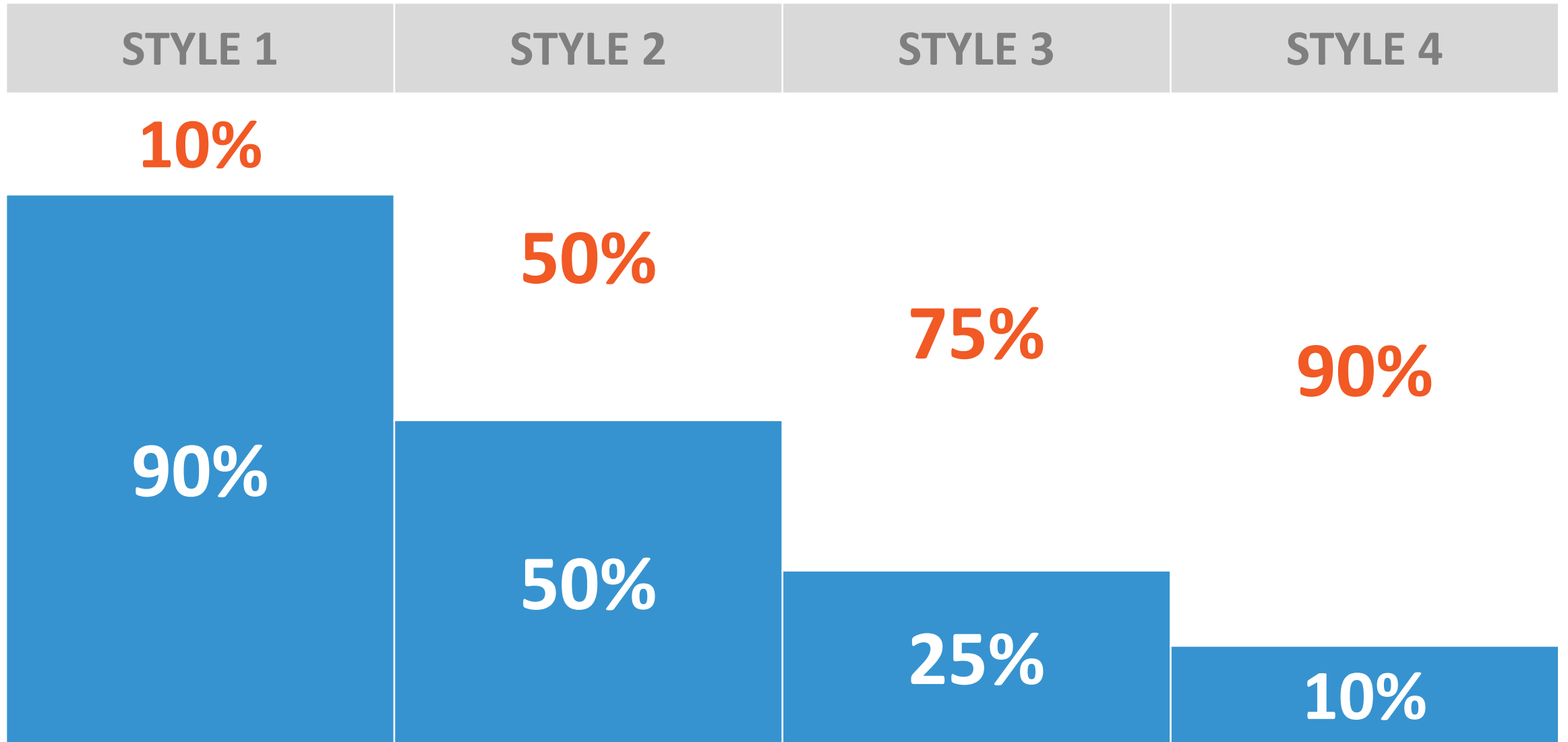
What is person's **commitment** in completing the goal?



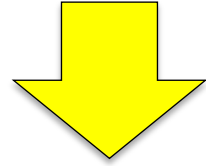

What is her **development level**?

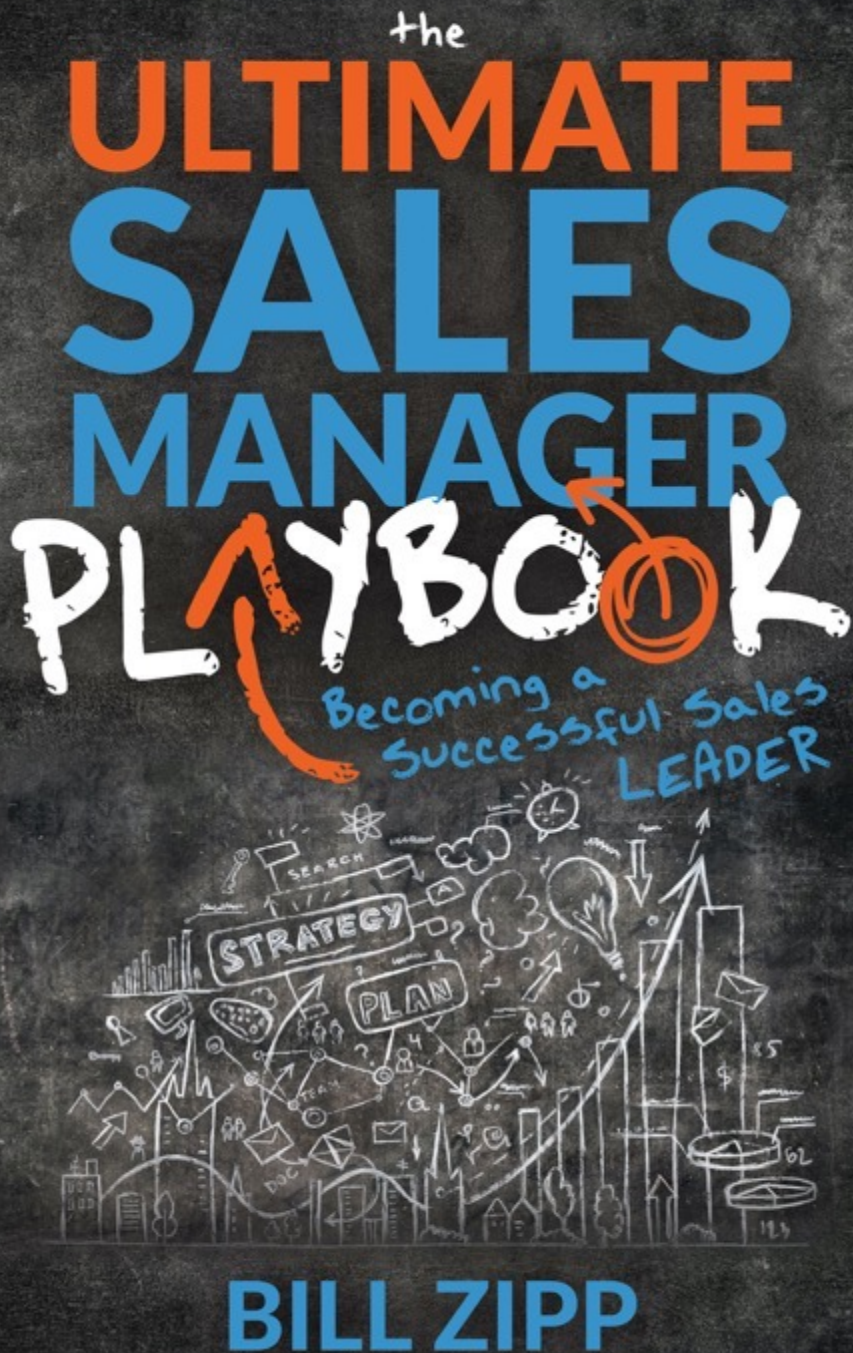
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- A. Ask her to complete her sales documentation on time and accurately, without pushing her. Continue to track the completeness and timeliness of her reports.
- B. Tell her to improve the completeness and timeliness of her sales documentation. Go over the areas that are incomplete. Make sure she knows what is expected and how to fill out each section of the report. Continue to track the completeness and timeliness of her reports.
- C. Ask her why her sales documentation is incomplete and late. Listen to her concerns and try to help her understand the importance of turning in accurate and timely reports. Continue to track the completeness and timeliness of her reports.
- D. Discuss sales documentation standards with her. Listen to her concerns but make sure she knows what is expected. Go over each section of the report and answer any questions. Continue to track the completeness and timeliness of her reports.

Talking versus Listening by Leadership Style



D1	D2	D3	D4
Low Competence and High Commitment	Low to Some Competence and Low Commitment	Moderate to High Competence and Variable Commitment	High Competence and High Commitment
			
S1	S2	S3	S4
High Direction and Low Support <i>I talk, I decide.</i>	High Direction and High Support <i>We talk, I decide.</i>	Low Direction and High Support <i>We talk, you decide.</i>	Low Direction and Low Support <i>You talk, you decide.</i>



Situational Sales Leadership

February 2024

Plus Follow-Up Webinar Sessions

Do These Three Things:

1. Complete the Situational Sales Leadership Quiz online by EOB
2. Listen to the SSL podcasts
3. Begin thinking through each member of your team

Your Dedicated Web Resource Page:

<https://billzipp.com/nintexsalesleadership/>



RECAST SOFTWARE



webex
by CISCO



businessolver[®]

SAP Concur



nintex



BILL ZIPP

Situational Sales Leadership STYLES

DIRECTION

Clear expectations

Step-by-step instructions

Concrete examples

Mid-course correction

More frequent accountability

SUPPORT

Asking questions

Active listening

Accurate reflection

Positive encouragement

Less frequent accountability

One of your salespeople and one of your pre-sales engineers have to work together often. In the past, they have not demonstrated the interpersonal skills needed to do this in a positive and productive manner. They spend more time catching each other doing things wrong rather working out their differences and partnering together. Last week a deal fell apart because they disagreed sharply with each other on a demo in front of a prospect.

What is the **specific goal**?

What is the **competence** in completing the goal?

What is the **commitment** in completing the goal?

What is their **development level**?

One of your salespeople and one of your pre-sales engineers have to work together often. In the past, they have not demonstrated the interpersonal skills needed to do this in a positive and productive manner. They spend more time catching each other doing things wrong rather working out their differences and partnering together. Last week a deal fell apart because they disagreed sharply with each other on a demo in front of a prospect. You should...

- A. Let the two people know that you are aware of the situation. Ask them to take care of it themselves and get back to you if they have any more issues to resolve.
- B. Meet with the two people and outline the problem as you see it. List the steps of action they need to take to resolve this issue immediately. Follow up every few days to make sure that your steps of action are implemented.
- C. Hold a meeting with the two and discuss the situation, but do not impose your ideas on them. Help them explore their own solutions to the problem and follow up in a month or so to see how things are going.
- D. Meet with the two together and listen to each of their points of view on the situation. Tell them what you think they need to do to work together better but ask for their ideas and incorporate them into a plan for a more harmonious partnership. Make it clear that the problem must be solved immediately and follow-up with them weekly.