

# **Situational Leadership**

**Mastering the Single-Most Important  
Sales Management Skill**


# Situational Leadership: Round TWO

**Team MATT**

**88%**

**Team DAVE**

**93%**



**Our ability to coach salespeople well is  
directly dependent on the quality of  
our connection with them.**

# The TRUST Triad

**CHARACTER**  
The kind of person  
you are



**COMPETENCE**

The quality of  
work that you do



**CHEMISTRY**


Your ability to  
connect with others



# Without TRUST Salespeople

- RESIST change
- IGNORE coaching
- RESENT correction
- DISMISS praise
- REMAIN the same

*Trust is the oxygen of human relationships  
that allows us all to breathe.*



We trust—and follow—people  
who are real, who are  
consistent, whose behavior,  
values, and beliefs are  
aligned. We trust people  
whom we do not constantly  
have to second-guess.



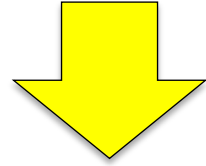

Richard Boyatzis  
Annie McKee  
Resonant Leadership



A top-down view of an artist's palette on a wooden surface. The palette contains several thick, textured dollops of paint in vibrant colors: purple, blue, green, red, orange, and yellow. Several paintbrushes with wooden handles and metal ferrules are scattered around the paint, some with paint on their bristles. A semi-transparent white circle is overlaid on the right side of the image, containing the text.

# **A Template for Sales Coaching Effectiveness**



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



S1	S2	S3	S4
<b>High Direction and Low Support</b>	<b>High Direction and High Support</b>	<b>Low Direction and High Support</b>	<b>Low Direction and Low Support</b>
<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><b>Check work frequently</b></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><b>Check work consistently</b></i></p>	<p>Ask questions and listen</p> <p>Analyze successes</p> <p>Provide reassurance</p> <p>Help hear own voice</p> <p>Clear path of problems</p> <p><i><b>Check work regularly</b></i></p>	<p>Treat as a partner/peer</p> <p>Celebrate successes</p> <p>Provide autonomy</p> <p>Recognize publicly</p> <p>Push for a little bit more</p> <p><i><b>Check work occasionally</b></i></p>

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**?

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. You would ...

- 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.



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.



What do you do if  
a salesperson goes  
**BACKWARDS** in  
development?



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
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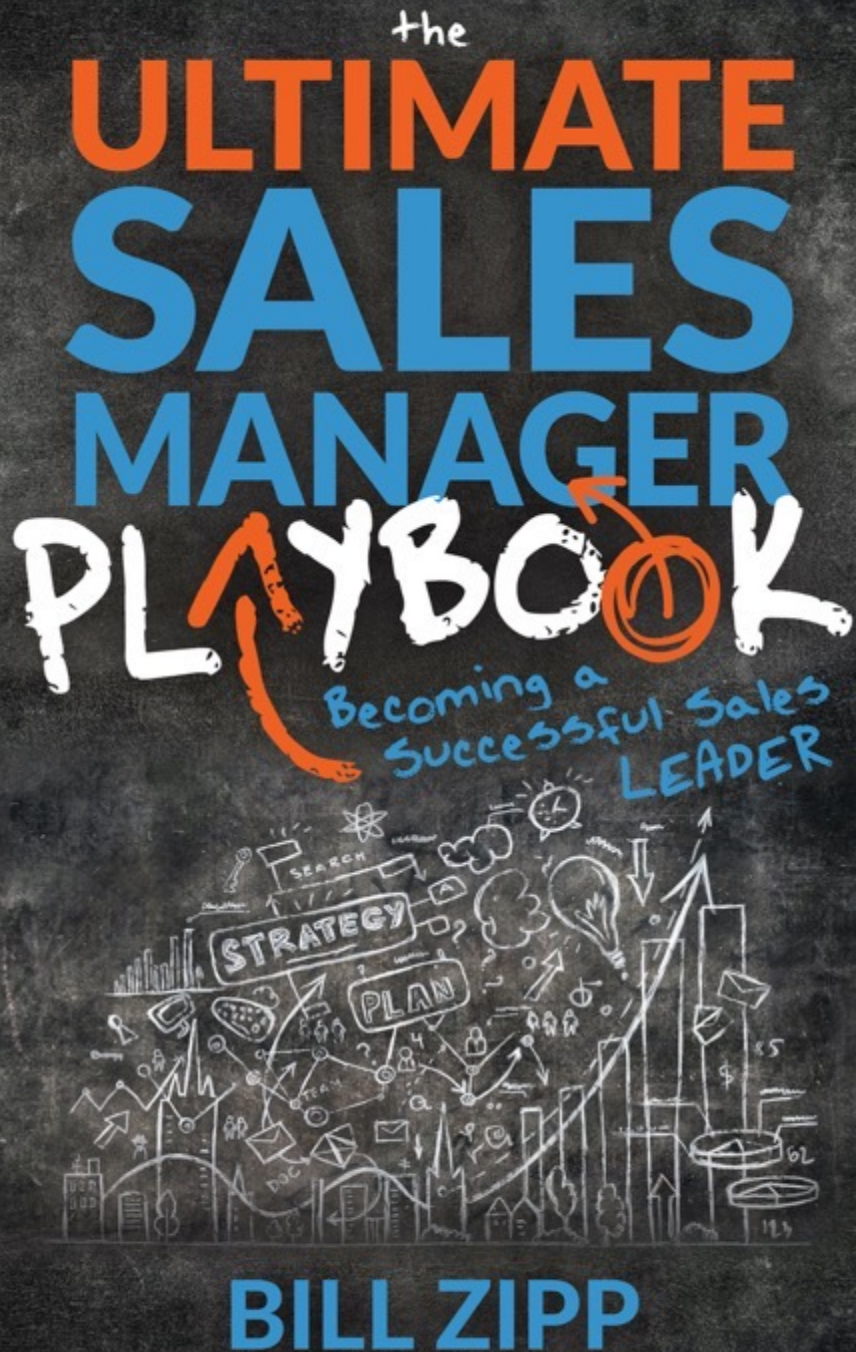
What do you do if  
a salesperson goes  
**BACKWARDS** in  
development?

- Start by asking questions in a Style 3 mode. Don't overcorrect!
- Find out what's changed: The sales goal or the motivational environment?
- Adjust your style accordingly, 3 to 4 or 3 to 2 (if necessary).
- Increase follow-through frequency to be more like a Style 1.

What do you do if  
a salesperson  
**DISAGREES** with  
you about their  
development?

- Clarify *exactly* what the sales activity you're asking of them really means.
- Measure *accurately* what excellence at this sales activity really looks like.
- If disagreement still exists, accept the salesperson's self assessment.
- Increase follow-through frequency to be more like a Style 1.





# Situational Leadership

February 7, 14, and 21

*4:00 PM in London, 8:00 AM in Los Angeles*

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**Do these two things:**

1. Complete the quiz. Beat the competition!
2. Listen to the podcasts.

**Your Dedicated Web Resource Page:**

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

