



**REPRODUCIBLE
TRAINING LIBRARY**
Customizable Soft-Skills Courseware

Selling Essentials: Coaching for Performance



Instructor Guide

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Instructional Design and Learning Philosophy

Sound Instructional Design

We are committed to providing core skills content that is relevant to today's organizational and personal development needs. Our expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These elements include:

- **Learning objectives** that provide effective tools for managing, monitoring, and evaluating training.
- **Relevant topics** that create meaningful connections between the course and participants' prior experiences.
- **Appropriate organization** of essential ideas, which helps participants focus on what they need to know in order to learn.
- **Modeling techniques** (where applicable) that demonstrate useful behaviors and problem-solving skills.
- **Active experimentation**, the cornerstone of learning, which helps participants connect what they've learned to real-life situations.
- **Consistent instructions and thoughtful visual design** that help participants learn and retain new information.

Due to the wide range of subjects covered in the Reproducible Training Library, the number of instructional elements and learning techniques varies between titles.

Application of Adult Learning Principles

Adults learn best by incorporating their personal experiences into their training and by applying what they learn to real-life situations. We support this process by incorporating a variety of learning techniques—role-plays, simulations, discussions, and lectures—into each course in order to appeal to all learning styles and ensure that the information will be retained.

Customizing Your Program

There are two ways you can tailor this program to your specific needs. You can customize the content and you can customize the format.

We created this program in Microsoft Word® to make it easy for you to modify the content as you would in any Word document. The Instructor Guide and Participant Guide follow an identical structure, so you can readily see how a change in one guide can be applied to the other. Common reasons for customizing content include:

- *Changing examples to fit your industry or work environment*
- *Modifying content to match work rules and procedures*
- *Adding, deleting, or rearranging content to accommodate training time constraints*

Another way to customize this program is to change the formatting. Some organizations add their corporate logo or branding, and a few make changes just to suit a preference. Again, treat the Instructor Guide and Participant Guide as you would any Word document. For additional help formatting Word documents, consult Microsoft's website.

Please note: Only the pages highlighted in yellow below are those featured in this preview.

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PREVIEW

Course Objectives

Successful completion of this course will increase your knowledge and ability to:

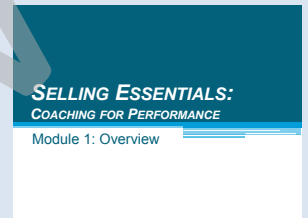
- Define coaching in a professional setting.
- Explain the importance of effective coaching and feedback.
- Identify your strengths and areas for improvement as a coach.
- Describe the challenges of coaching.
- Demonstrate how to use the Coaching Model.
- Describe the best practices for giving feedback.

Trainer Notes

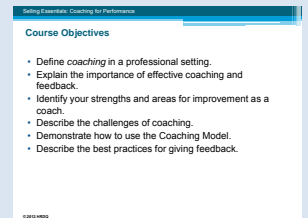
5 minutes



Introduce yourself and provide a brief background about yourself if participants don't know you.



Go over logistics (schedule, breaks, restrooms, etc.) and any ground rules for the day. Typical ground rules include no use of electronics, showing respect for every participant, participating fully, and no dominating or interrupting.



Review the course objectives with participants.

The Sales Process



1. *Prospecting and Territory Management*
2. *Opening the Sales Call*
3. *Listening and Questioning*
4. *Presenting Solutions*
5. *Overcoming Objections and Closing*
6. *Developing Clients for Life*

Trainer Notes

5 minutes



“Coaching is an effective way to improve sales performance. Before we talk about the specifics of coaching, let’s review the sales process.”

“First, your reps spent time prospecting and identifying qualified leads. Next, they convinced the prospect to meet. Each time they met, they opened the Sales Call. They positioned themselves as experts and set a positive tone for doing business.”

“As they got to know the prospect and asked questions to understand his needs, they listened to determine whether your company could provide a solution to fit those needs. They presented the best solution and may have had to overcome customer objections. Then they closed the sale. After the sale, they continued to develop strong client relationships.”

Ask: “When do you think it is best to have coaching conversations?”

“It makes sense to coach throughout the sales process. When you see an opportunity to add value and improve performance, that’s the time for a coaching conversation.”

“Early in the sales process is the best time for coaching about strategic opportunities. Later in the process, your coaching will be more tactical and focus on call planning.”

Self-Assessment

Individual Activity

Instructions: Reflect on your past experiences. Be honest with yourself as you assess your skills.

Read each of the following and write the number that applies:

1–Never 2–Rarely 3–Sometimes 4–Often 5–Always

Listening	Rating
<i>I paraphrase what others say to confirm understanding.</i>	
<i>I use body language to show I am listening.</i>	
<i>I am focused and give the speaker my full attention.</i>	
<i>I listen “between the lines” to hear what is not being said directly.</i>	
Communicating	Rating
<i>I ask questions before stating my opinion.</i>	
<i>I communicate clearly and in a positive manner.</i>	
<i>I ask others to speak objectively and encourage them to express their ideas.</i>	
<i>I provide constructive feedback in a timely manner.</i>	
<i>I make direct statements and avoid indirect hinting.</i>	
Leading Coaching Conversations	Rating
<i>I ask permission before leading coaching conversations.</i>	
<i>I ask my direct reports for their self-evaluation before I share my feedback with them.</i>	
<i>When I provide feedback, I note specific behaviors and their impacts.</i>	
<i>After coaching conversations, I plan specific next steps with my direct reports.</i>	

As I reflect on my experiences and skills in coaching:

My key strength is: _____

My top area for improvement is: _____

Trainer Notes

10 minutes

“Before we look at what it takes to develop coaching skills, let’s reflect on our current skills and experiences in this area.”

Activity: Review the instructions. Allow 5 minutes for participants to take the assessment. Assure them that this is confidential and for their own review.

Debrief by leading a discussion about recognizing strengths and areas for improvement. Note that this course is meant to provide participants with ideas for sharing best practices, help them build on their strengths, and give them opportunities to improve where needed.

Tell participants to be aware of the areas in which they want to improve during the course. Encourage them to ask questions so they get the most out of this experience.

The Business Case for Coaching

Business Changes

Topic	Then	Now
Leadership Style	Manager/Boss	Leader/Coach
Leadership Skills	Telling	Asking
Workplace Culture	Leaders command	Employees are empowered
Knowledge Sharing	Top-down hierarchy	Fast-moving wirearchy (social media)
Technology	Steady and small changes	Rapid and continuous changes
Competition	Local	Global

The business world is in the midst of a paradigm shift. Rules have changed. Processes that people once used to achieve their objectives are no longer viable, and traditional roles and hierarchical working relationships are no longer effective.

Competition is worldwide and technological changes bring new challenges every day. Leadership and coaching skills are needed now more than ever.

“The goal of coaching is the goal of good management: to make the most of an organization’s valuable resources.”

—Harvard Business Review

Trainer Notes

5 minutes

“In today’s fast-changing and competitive business world, business leaders are asking, ‘How do I make the most of what I have?’ The answer lies in effective coaching.”

“When you help employees reach certain goals by coaching them, you begin to turn your vision of high performance into reality. That is, you start to move your business from where it is to where you want it to be.”

Topic	Then	Now
Leadership Style	Manager/Boss	Leader/Coach
Leadership Skills	Telling	Asking
Workplace Culture	Leaders command	Employees are empowered
Knowledge Sharing	Top-down hierarchy	Fast-moving wirearchy (social media)
Technology	Steady and small changes	Rapid and continuous changes
Competition	Local	Global

“The business world is in the midst of just such a paradigm shift. Rules have changed. Processes that people once used to achieve their objectives are no longer viable, and traditional roles and hierarchical working relationships are no longer effective.”

“High performance is no longer an option—it is required for individuals and organizations to survive.”

“Competition is worldwide and technological changes bring new challenges every day. Leadership and coaching skills are needed now more than ever.”

“In this new business world, the question is this: What has the power to fundamentally change the way you do business? The answer is effective coaching.”

Module 2



What Is Coaching All About?

What Is a Coach?

coach: from French *coche*, from Hungarian *kocsi*, after *Kocs*, a village in Hungary where coaches were first made; in the sense: to teach, probably from the idea that the instructor carried his pupils (Collins English Dictionary, Complete & Unabridged 10th Edition, © HarperCollins, 2009).

My definition:

What Does Coaching Involve?

- **Focuses on improving behavior.** *Skills are easy to see and much easier to change than personality.*
- **Uses strategies that help both the coach and team member (“coachee”) grow.** *In a good coaching relationship, the coach learns new things from the team member and more about how that person thinks. The coachee learns to think more for herself, acquires new skills, and trusts the coach.*
- **Uses pain and gain as change motivators.** *What makes people change their behavior is an adequate dose of either the fear of loss or the hope of gain. This must be generated from within the mind of the coachee and is based on commitment, not compliance.*

“[Coaching] is taking a player where he can’t take himself.”

—Bill McCartney

Trainer Notes

10 minutes

SELLING ESSENTIALS: COACHING FOR PERFORMANCE

Module 2: What Is
Coaching All About?

Allow a minute for participants to read the origin of the word *coach*.



“In the old days, coaches carried people from one place to another. In a sense, coaches do the same today. They help people figure out where they want to go in terms of their skills and careers and ‘transport’ them there.”

Ask: “Based on that explanation, what is your definition of a coach?” Allow 2 minutes for participants to write their definitions.

Debrief by asking several participants to share their definitions.

(Potential responses: Someone who helps others achieve their goals; a manager who helps you determine goals and reach them.)

“People’s definitions will vary. What matters is that we understand that a coach’s role is to lead people on a journey to improve their performance.”

Review “What Does Coaching Involve?” State that these topics will be covered in detail later.

The Coaching Model



The Coaching Model can be used at any time. Typically, you and your coachee will set a goal to improve his behavior. As you observe his behavior, you will want to discuss it with him.

Ask: First, ask permission to engage in a coaching conversation, and then ask questions to understand your coachee's behavior.

Provide feedback: Next, provide feedback about what you observed. Discuss what went well and what the challenges were. Then, come to an agreement on the feedback—make sure the coachee understands your feedback and agrees it's valid.

Review goal: Lastly, define a realistic goal for the future based on that conversation. Agree on the appropriate next steps for reaching that goal.

Part of the beauty of coaching is that you will always be asking questions, providing feedback and setting new goals based on what you learn.

Examples of When to Use the Coaching Model:

- In pre- and post-call planning
- In the field (ride-alongs)
- In planning and review sessions
- All the time, anyplace

Trainer Notes

10 minutes

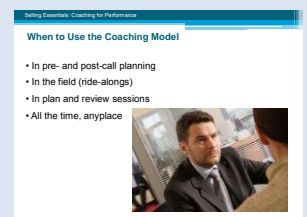
“As you have seen, many factors go into being an effective coach and leading a coaching session. Let's turn our attention to how to make coaching interactions successful and productive for both the individual being coached (the 'coachee') and for you, the coach.”



“Let's look at the Coaching Model, which will support your efforts. It's a process for coaching and modifying behaviors. And because the relationship between you and the coachee is collaborative, independent thinking is encouraged. Keep in mind, however, that the coachee does have ultimate responsibility and accountability for his own actions.”

Review each phase of the Coaching Model.

“As we discussed, this coaching process can be used any time you are focused on helping a team member grow. The process can be done in 2 minutes or you might have a longer conversation.”



Review when to use the Coaching Model.

Phase 1: Ask Questions

The first phase of the Coaching Model is asking questions. This will help you zero in on important issues and learn more about your coachee and what he needs.

Questioning will uncover key issues including where the coachee is and where he wants to go. How is he doing? What specific skills does he need to improve? To find out, you need to ask questions and observe. As we learned in the Coaching Model, you will continue to ask, provide feedback, and review goals.

Typical questions in a coaching conversation are “What Happened?” questions. They get the coachee to open up and describe the call or situation.

Open-ended questions require longer answers that require the coachee to elaborate.

Open-ended questions typically start with:	Closed questions typically start with:
<ul style="list-style-type: none"> • How... • What... • Why... • Tell me... • Which... • Describe... 	<ul style="list-style-type: none"> • Who is... • Is it... • Are you... • Did you... • Was there... • Can you...

Clarifying questions are open-ended questions that probe and provide further understanding. They enable you to understand the coachee’s expectations, priorities, and needs in a more detailed way. These questions allow free responses that may reveal hidden concerns or feelings. By asking clarifying questions like those below, you can pinpoint what the coachee is thinking about.

- “Tell me more about ...”
- “How do you feel about it?”
- “What seems to confuse you?”

Individual Activity

Instructions: Think of someone you plan to coach. List clarifying questions you will ask to understand their concerns better.

Trainer Notes

15 minutes

Asking Questions

Open-ended questions typically start with:	Closed questions typically start with:
<ul style="list-style-type: none"> • How... • What... • Why... • Tell me... • Which... • Describe... 	<ul style="list-style-type: none"> • Who is... • Is it... • Are you... • Did you... • Was there... • Can you...

Examples:
 Open-ended: What are the ways you prep for a client call? How did the client react?
 Closed: Did you have a good conversation with the client? Are you confident the deal will close?

Review the importance of questions. Compare open-ended and closed questions.

"What Happened?" Questions

- What was your call objective?
- Describe how the call went.
- Describe your concerns about the meeting?
- What were your expectations at the meeting?
- How did the client respond?

Review “What Happened?” questions.

Clarifying Questions

Clarifying questions are open-ended questions that probe and provide further understanding.

Open-ended questions typically start with:
<ul style="list-style-type: none"> • How... • What... • Why... • Tell me... • Which... • Describe...

Examples of Clarifying Questions:

- “Tell me more ...”
- “Why is that important?”
- “What do you mean?”

Review Clarifying questions.

Activity: Review the instructions. Allow 5 minutes for participants to create clarifying questions.

Debrief by asking several participants to share their questions.

Coaching Styles

Coaching Style has two dimensions: assertiveness and expressiveness. The intersection of assertive and expressive behaviors results in four unique styles, as shown below.

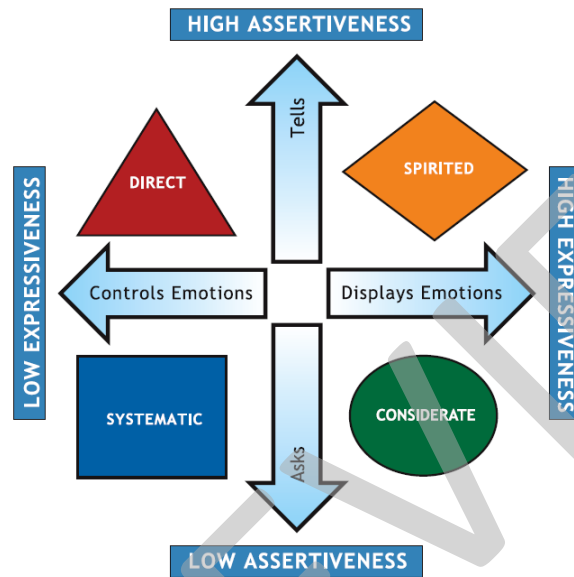


Figure 1: The Coaching Style Model

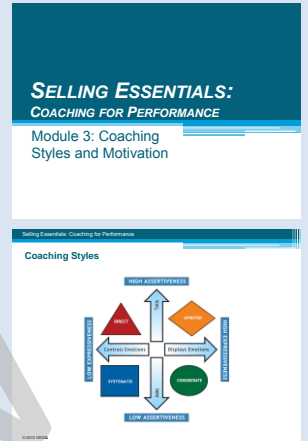
Assertiveness: The effort that a person makes to influence or control the thoughts or actions of others.

Expressiveness: The effort that a person makes to control his or her emotions and feelings when relating to others.

- High assertiveness + low expressiveness = **Direct** style
- High assertiveness + high expressiveness = **Spirited** style
- Low assertiveness + high expressiveness = **Considerate** style
- Low assertiveness + low expressiveness = **Systematic** style

Trainer Notes

5 minutes



Review coaching styles. Remind participants to be aware not only of their own style, but also that of the person they're coaching. Ask participants to begin thinking about what their personal coaching style might be.

Strengths and Areas for Improvement

Each style has definite strengths that are evident in general behavior—that is, what we typically see in others in our day-to-day interactions. Knowing these strengths allows us to draw on them and to find situations in which they are a benefit. Below is a chart that explores each style’s strengths and areas for improvement.

Coaching Style	Strengths	Areas for Improvement
Direct	<ul style="list-style-type: none"> • Provides candid feedback • Tells the coachee how to get the job done • Offers solutions to problems 	<ul style="list-style-type: none"> • Can be controlling and overbearing • Doesn't focus on feelings • May push aside personal feelings
Spirited	<ul style="list-style-type: none"> • Offers inspiration • Generates excitement • Strives for the best • Addresses issues as they come up 	<ul style="list-style-type: none"> • Generalizes and glosses over details • Is a poor planner and is rarely concerned with time constraints
Considerate	<ul style="list-style-type: none"> • Encourages learning • Listens for understanding • Shows patience 	<ul style="list-style-type: none"> • Avoids change; dislikes conflict • Tends to be overly emotional • Has difficulty saying no
Systematic	<ul style="list-style-type: none"> • Presents precisely • Seeks information • Excels at problem solving • Models logical thinking 	<ul style="list-style-type: none"> • Continually seeks more information • Avoids contentious issues • Feels uncomfortable with emotions; appears impersonal

My best guess for my coaching style: _____

Trainer Notes

10 minutes

Review the strengths and areas for improvement of each style.

Allow a few minutes for participants to reflect on the different styles and then have them guess which one is their coaching style.

Debrief by having a few participants share their styles.

Remind them that the purpose of this section is to open their minds to different styles and help them become aware of their strengths and areas for improvement as coaches.

Creating a Culture of Coaching

Group Activity

Instructions: What are some ways you can involve your team and instill a culture of coaching? Be prepared to share your top tips with the class.

My group's ideas:

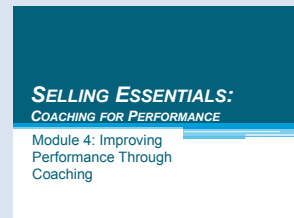
Other groups' ideas:

“Coaching is unlocking a person’s potential to maximize their own performance. It is helping them to learn rather than teaching them.”

—Timothy Gallwey

Trainer Notes

15 minutes



“In order to create a culture of coaching, managers must ‘walk the talk.’ It is not enough to participate in this coaching program—you must implement what you learn.”

“In this module, we will talk about the best practices for instilling a culture where coaching is an accepted and valued practice.”

Activity: Review the instructions. Allow 5 minutes for groups to identify tips.

Debrief by asking each group to share their ideas.

Instruct participants to record the other groups’ ideas in their Participant Guides. Tell them to put an asterisk (*) next to the ones they like best and would use. Remind them to refer back to these ideas after the program.

(Potential responses: Plan and schedule coaching meetings; help reps plan for tactical and strategic opportunities; stay abreast of reps’ deals from prospecting to closing; keep an open-door policy; have a variety of interactions, both unscheduled (as needed) and planned—for instance, travel together on sales calls and have pipeline meetings, one-on-one coaching conversations, quarterly business reviews, team meetings, etc.)

Course Review

1. Describe when you should coach during the sales process.

2. List at least two components of providing feedback (phase 2 of the Coaching Model).

3. Which is the correct sequence for the Coaching Model?

- a. Ask, Provide Answers, Set Goal
- b. Ask, Provide Feedback, Review Goal
- c. Advise, Provide Feedback, Review Answers
- d. Advise, Provide Answers, Set Goal

4. Coaching can change the paradigm for how you do business and help achieve your vision of high performance. True or False?

5. The definition of coach is derived from the word *kocsi*, after *Kocs*, a village in Hungary where coaches were first made; in the sense: to teach, probably from the idea that the instructor carried his pupils. True or False?

Answer Key

1. You can coach at any point of the sales process. Typically, strategic conversations should occur early in the process, while more reactive conversations take place later in the cycle.
2. Invitation—Invite the employee to take part in the conversation.
Feedback—First ask for feedback from the employee. (What went well? What was challenging? What would you do differently?) Then provide your feedback.
Agreement—Agree on the feedback—make sure the coachee understands your feedback and agrees it's valid.
3. b
4. True
5. True

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“I have used many of the *Reproducible Training* programs and I can't say enough good things about them. The content is easy to tailor—I've even combined programs to meet my clients' specific needs. Not only am I able to provide my clients with a professionally developed, customized program at a reasonable price, but I've saved myself a lot of time and frustration, too. I plan to buy more programs in the future. I highly recommend them!”

Rosemary C. Rulka, MS, SPHR
President
R.C. Rulka Consulting, LLC

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