

# The Coaching Manager

## **Making the Most out of Field Visits.**

The visit of a sales manager to a sales executive out on their "territory" should be an opportunity for growth and development for the executive, the sales manager, the organisation and the customer. More often than not, this is not the case, with the executive often dreading the visit as it is seen as purely an assessment.

Allan Mackintosh BSc FInstSMM, who has over twelve years experience of performing "field visits" with sales executives as a sales manager and sales coach, investigates the difference between a developmental and motivational field visit as opposed to one which promotes dread and fear.

There are tremendous advantages of performing field visits with sales executives. From the executive's point of view, here is a chance to impress, to let the boss see what happens in the real world, and to sit down, face to face, with the manager to review progress and to discuss career development. From the manager's perspective, the visit is a chance to observe the executive's skills, to coach them to enhanced performance, to praise, and to discuss any issues and concerns that the executive may have. From the organisation's point of view, these coaching visits by the manager should lead to increased motivation, capability and performance of the sales executive leading to increased sales results.

Why then, do field visits often produce the opposite, with executives dreading "the boss" coming out with them?

Let me take you through the four key elements of any field visit and within each I will outline what should happen and what potentially can go wrong.

### **1. Contracting.**

Contracting is simply an agreement between the manager and the sales executive. Contracting should take two forms.

Firstly, a contract should be set up in terms of how the day should look. (when and where the manager meets the sales executive.) At this stage the manager should agree what his objectives are for the day in terms of how long he is going to stay with the executive and what he would like to see and discuss. The manager should also ask the executive what his or her aims are for the day in relation to both the business for the day and what they are expecting from the manager. It should be a win/win situation. This phase of contracting should happen prior to the visit.

Secondly, this contract should be revisited on the day, prior to the start of any sales calls and it should be extended to agreements around what happens in the sales call. How does the manager behave? When, where and how does he or she give feedback?

If a solid contract is agreed then both the manager's and the executive's expectations are being explored and hopefully met. Both should have the needs for the day met.

My experience has shown me that contracting does not happen as regularly or as fully as it should. Expectations tend to be one-way with the manager dictating what he or she wants to get out of the day and very little attention paid to the sales executive's needs. The sales executive sees the day as the manager coming out to assess. This puts the sales executive very much on the defensive and they then begin to structure the day to satisfy what they think is important for the manager to see, as opposed to structuring the day to get the most out of the time they have with their manager. Many sales executives will fill their day with sales calls, keeping the manager on his toes, and letting the manager see that they are "busy". What about the important review times between calls and dedicated discussion time for reviewing progress and career development?

Once a contract is agreed it must be kept, or only changed through agreement. The worst thing that can happen is that the contract is broken by the manager. Broken contracts lead to mistrust.

## **2. The Pre- Call.**

This is the vital element that will dictate just how competent a sales executive is in terms of planning the sales call both in terms of objective setting and strategy. Also, this is a chance for the manager to use their coaching skills to enable the sales executive to set specific objectives and to think through their plan of approach in order to hit the objectives. Time should be taken prior to each call, and the manager should support the sales executive to set S.M.A.R.T (specific, measurable, achievable, realistic, timed) objectives. Discussion and coaching should take place in order to support the executive to map out the best way forward for them to achieve the objectives. Challenge should also be used when objectives are not specific enough or not "stretching" enough.

All this takes time, but it is well worth it. I've seen too many managers not take the time to coach the sales executive through this stage and as a result the executive has "woolly" objectives and an unclear approach as to how to tackle and sell to the customer. The result of this can be no sales and "less than appreciative" feedback from the manager! Take the time before every call!

## **3. The In-Call.**

This is where the sales call actually takes place. Depending on the agreed contract beforehand, the sales executive will perform the call and the manager will observe. Sometimes with new sales executives, the manager will agree to come in and support the sales presentation, but with more experienced executives, the manager should observe the sales call only. All the time whilst observing the manager should be listening intently to how the call is progressing and be observing body language of both the executive and the customer. All this information will be needed if good quality feedback is to be given after the sales call is over.

Many managers do not observe the rule of observation, even if a contract has been agreed. Some take over the call leaving the executive, and potentially the customer, frustrated. Some butt in at inappropriate moments, causing greater frustration. Keep out unless the contract you have agreed dictates that you can come in and support at appropriate times! It is the manager's responsibility to support and maintain three-way rapport.

## **4. The Post- Call Analysis.**

Immediately after the sales call, time should be taken to analyse how the sales call has gone. How did the sales executive do in respect to their specific objectives? What went well, not so well? What were the manager's observations? This is the stage where the manager's skills should really come to the fore. How well can the manager coach? Do they know how to use the right coaching intervention with the right individual at the right time? How good at giving feedback are they? Do they praise enough?

A useful structure for a post-call analysis is offered by: POW!

Where:

P = Praise. The first thing a manager should do is praise regardless of how well the call went. Managers are too quick to jump on what didn't go well as opposed to praising what did go well.

O= Objectives and Observations. How well did the sales executive fare against their specific Objectives? Invite them to do a self-assessment of what went well and not so well. Reinforce this self-assessment and add anything relevant through your own Observations.

W= Way Forward and Will. Once an agreement has been obtained about how well the call went, coach them to greater performance next time by having them forge new objectives for that specific call together with coaching them to explore the various options available to them. Help them decide what approach is best for them and then check their Will in order to carry them out.

This stage of the field visit is the one that can cause the most damage. More often than not, managers do not praise enough. They are quick to give their opinions of what happened rather than let the sales executive explore what happened. Managers tend also to give advice as opposed to coach. "I would do it this way....it worked for me.....you try it....etc" Giving advice is necessary in some instances and the approach is dictated by the skill and the will of the sales executive that is being worked with. How many managers can coach effectively? How many use the Skill/Will Matrix to determine their coaching approach to a particular sales executive? Doing an effective post-call analysis that is developmental and motivation takes time and this can impact upon contact rates. Also, this time isn't usually built into the contract because the contract is either non-existent or "flimsy". Put time aside! This stage is crucial if the capability of the sales executive is to be increased. Managers have to build in the time and they have to have the necessary coaching skills in order for the post-call analysis to be effective.

The Managers who contract well, who coach, praise and give good quality feedback together with having a mindset of development versus assessment are the managers who look forward to field visits because of the results that can be obtained. Also these are the Managers that are welcomed on field visits by the sales executives as opposed to those that are dreaded.

What type of manager are you?

About the Submitter:

Allan Mackintosh is a Professional Management Coach specialising in developing field coaching skills in Managers. He can be contacted on 00 44 1292 318152 or e-mail [allan@performance-am.com](mailto:allan@performance-am.com)

Websites: [www.performance-am.com](http://www.performance-am.com)  
[www.pharmacoach.com](http://www.pharmacoach.com)