Cultivating sales manager capabilities through coaching

A global healthcare organization's leadership recently identified a critical gap in their sales managers' abilities to coach their teams and provide feedback.

Although the organization had attempted multiple in-house coaching programs over the years, none had fully achieved their goals, as participating managers applied their learning with limited success. The organization needed new approaches to helping sales managers fine-tune their feedback and practicing coaching in the flow of work.

BTS was already working with the organization to transform its larger culture through a separate global leadership initiative. Thus, when the organization sought to develop its sales teams, continuing the partnership and tapping into BTS's trusted approach to sales coaching and feedback culture was a natural choice.

The solution

BTS and the organization co-created a solution that leveraged the combination of an experiential, practice-based workshop with two **Practice with an Expert** **(PwE)** sessions on the topics of feedback and sales coaching. The solution consisted of two 90-minute sessions spaced four to five weeks apart, and conveyed critical capabilities for over 30 global front-line leaders, including district and country sales managers. Participating managers improved their coaching skills by accessing an interactive software platform called Momenta that allowed coaches to provide real-time feedback measuring aspects of sales managers' performance, such as the number of open- or close-ended questions asked, number of powerful questions asked, and adherence to the coaching model.

Building capabilities: the feedback journey and PwE process

Sales managers completed a **Moments-Based Assessment** and attended a **Feedback Workshop** to unlock the right mindset for coaching conversations. During the workshop, leaders received simple tools for efficient and effective feedback communication. The majority of the time was spent preparing for and role-playing a realistic feedback conversation.

The **PwE session** embedded feedback and coaching skills through three simple steps:

- Managers received a customized sales case study that required them to provide feedback or coaching to a direct report
- After reviewing the scenario, managers refined their feedback and coaching skills while role-playing with their coach.
- Coaches then interpreted qualitative and quantitative data from the software, identifying both strengths and areas for improvement to be applied in the second and final round for both feedback and coaching PwE sessions. Coaches also provided a final report with additional areas of improvement for sales managers to continue working on, for both feedback and coaching sessions.

Results and testimonials

From the **feedback-focused PwE session**: by the second round, 86 percent of managers successfully leveraged all components of the feedback tools. 100 percent of managers were satisfied or very satisfied, and rated it **4.9 out of 5**.

From the **sales coaching PwE session**: by the second round, 87 percent of managers successfully applied all components of the coaching model. 100 percent of managers were satisfied or very satisfied with it, and rated it **4.8 out of 5**.

Throughout the coaching program, sales managers also received "Go-Do" actions that helped them bring the skills and capabilities they were exposed to in every aspect of the journey back on-the-job. All participants demonstrated a better understanding of the necessity of feedback, and agreed to future feedback and coaching conversations to sustain their learning.

Overall, the coaching program has continued to thrive, and the organization is currently facilitating PwE for a third cohort, building on its continued successes in sales manager coaching.

- **"I liked the ability to role-play the situation twice, and actually have the recorded assessment to give facts and data on how it went."**
- **"I had a great coach who was flexible in adapting to individual needs. We had profound [discussions] on coaching. Analyzing the conversation together was helpful."**
- **"The coach was well informed on the subject. In particular, I learned a lot about how to address the intangible. It was eye-opening for me."**

