

How to Be a Sales Coach

A Playbook for Promoted Reps, Existing Managers, and Enablement Leaders Looking to Improve Their Practice



 AMBITION





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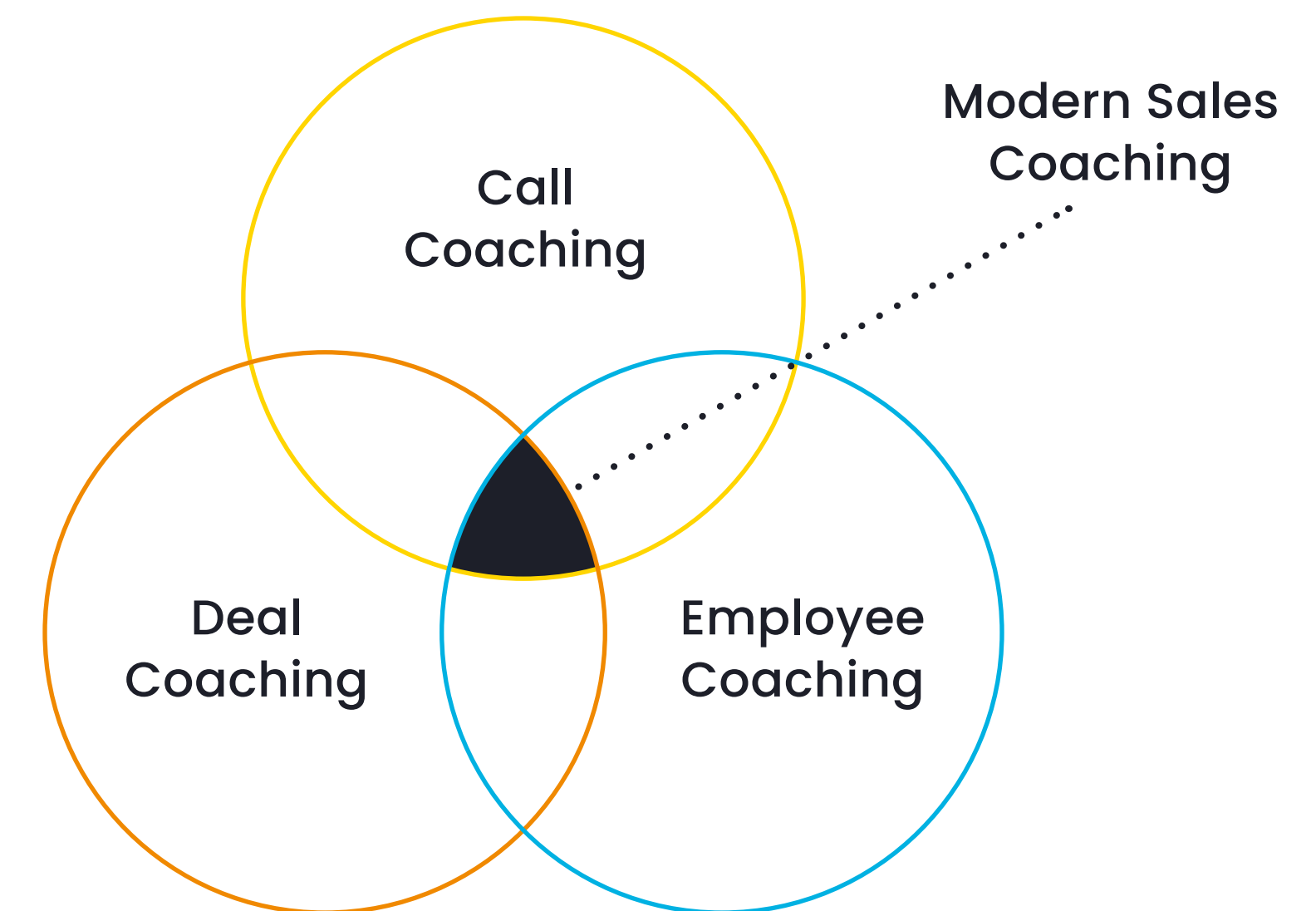
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CHAPTER 01

What is Sales Coaching?

Sales coaching is more than just call coaching, script training, or reinforcing enablement. It's a process in which a sales coach works with a salesperson or sales team to improve their performance and reach their sales goals. This can include training on techniques for building relationships with clients, closing deals, and managing a sales pipeline, as well as providing guidance and feedback on the salesperson's performance. When sales managers **coach** reps consistently and **track** their performance, they help their teams **achieve** greater outcomes and hit sales goals.



The Role of a Sales Coach

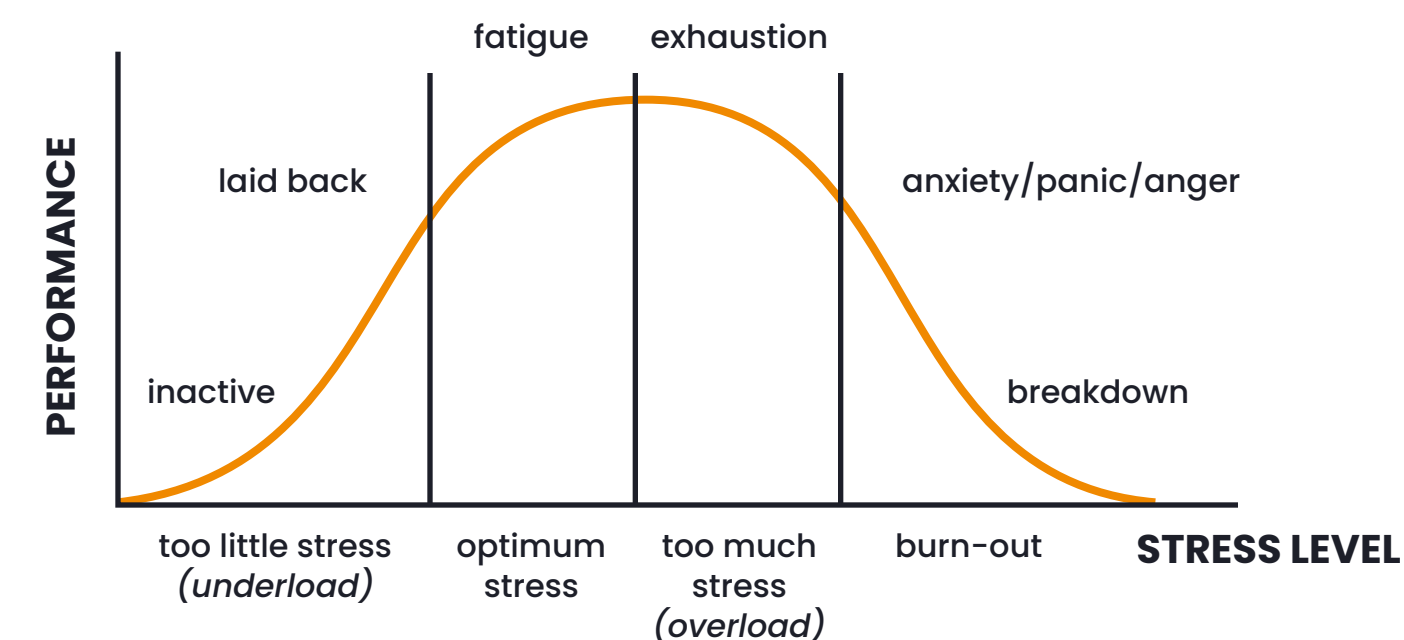
The primary role of the sales manager is to coach their teams to become more productive, effective, and efficient. By providing training, guidance, and feedback, sales coaches help their people develop the skills and knowledge to be successful in their role. Some specific responsibilities of a sales coach include:

- **Assessing the sales team’s strengths and weaknesses:**
The coach will evaluate the team’s current performance to identify areas that need improvement.
- **Developing training and coaching plans:**
The coach will create a customized plan to address the identified areas of improvement and help the sales team reach their goals.
- **Delivering training and coaching:**
The coach will lead training sessions, coach individuals and teams, and provide ongoing support and guidance alongside the [sales enablement](#) function.

- **Motivating their team:**
Great coaches help reps find intrinsic motivation through tactics like goal visualization, [scoring](#) and weighting activities and objectives, and by balancing pressure and performance as seen in the Yerkes-Dodson Law.

When people feel bored, they aren’t motivated. When they feel overwhelmed, they don’t perform well. There’s a window of optimal stress in between the two that yields peak performance. Great sales coaches help their people find that sweet spot so they stay motivated, feel challenged, and are able to grow.

Yerkes-Dodson Law Stress Curve



Bill Eckstrom, author of [The Coaching Effect](#), pioneered the concept of not only coaching to create growth, but to create the right growth environment. Similarly to the Stress Curve, somewhere between stagnation and chaos is the right balance of order and complexity to create a high-growth coaching program and environment. [See his talk about growth rings here.](#)

People feel motivated when they win. When reviewing progress to goal and performance with reps, coaches should celebrate every small win along the way. Recognizing seller [progress](#) will result in higher confidence and motivation. [Read more about the Progress Principle here.](#)



— **Providing feedback and guidance:**

Sales coaches will provide feedback and guidance to each person on their team. This might happen during a 1:1, team coaching session, or real-time coaching moment and could be directive or more developmental in nature.

— **Monitoring progress:**

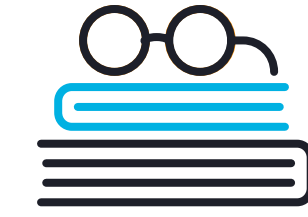
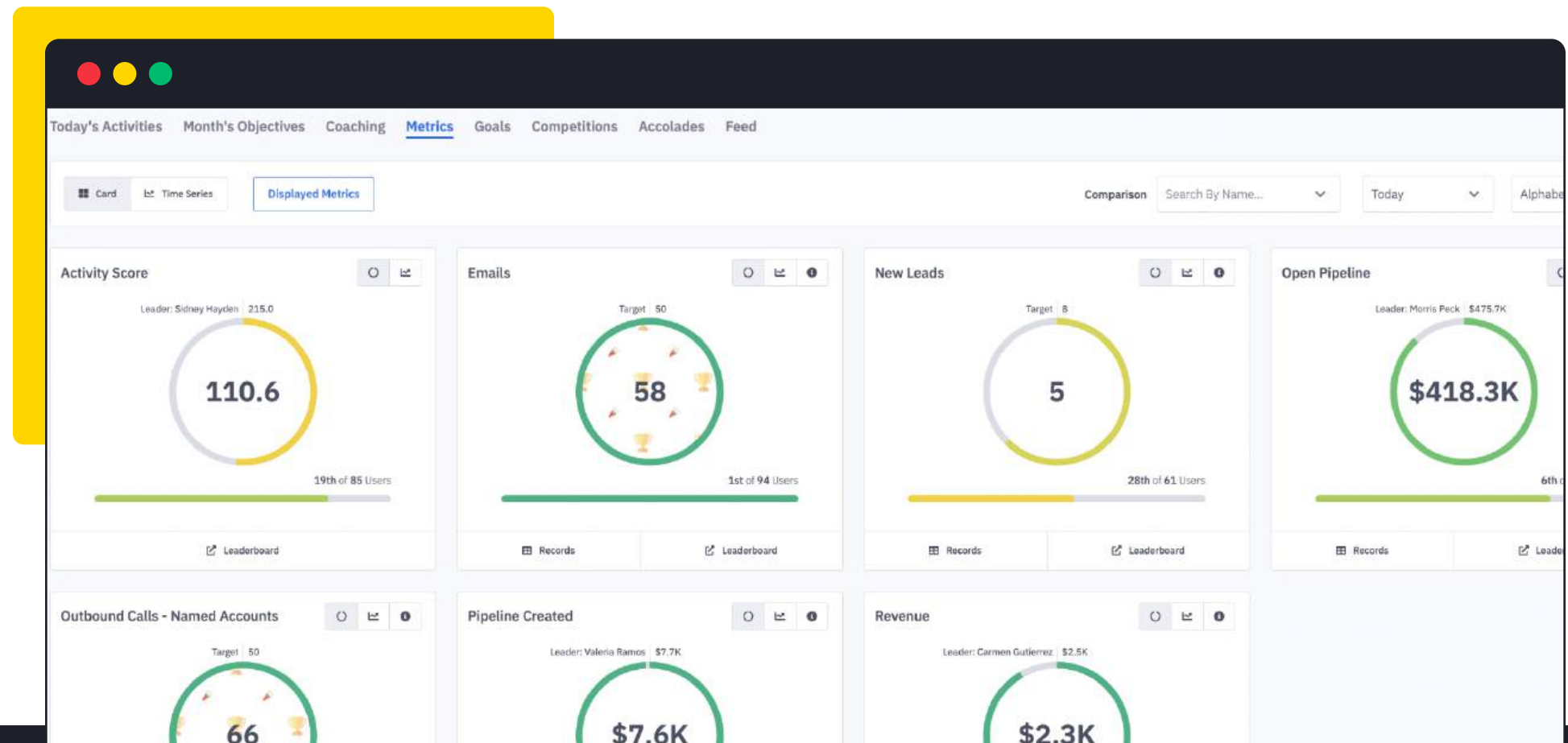
The coach will regularly track sales team progress and adjust their coaching plan as needed. Sales coaches should track a variety of **metrics** to effectively evaluate the performance of their team and identify areas for improvement. These metrics should include both leading and lagging sales metrics.

Examples of leading metrics:

- Calls made
- Emails sent
- Meetings set
- Opportunities created

Examples of lagging metrics:

- Revenue booked
- Quota attainment
- Churn rate
- Win rate
- Renewal rate



Ambition's Picks

Books to help you identify and measure KPIs
[Cracking the Sales Management Code](#) + [Predictable Revenue](#)

— **Building a culture of continuous learning:**

The coach will help create an environment that promotes continuous learning and development, encouraging the sales team to take ownership of their own growth and performance.

— **Acting as a sounding board:**

The coach will also be available to listen to the salespeople's concerns, ideas, and insights, providing guidance on how to overcome obstacles and achieve success.

— **Staying current with industry trends:**

The coach will stay up to date with the latest sales trends, techniques, and best practices and incorporate them into their coaching program.

— **Reinforcing enablement:**

Sales coaches play a key role in the success of sales enablement programs. They should use 1:1 and team coaching sessions to reinforce **enablement training** and partner with the enablement function to measure enablement effectiveness.

The role of a sales coach is not limited to these responsibilities, and it can vary depending on the needs of the sales team and the company. **The most important role a coach plays is to help the sales team to improve their performance and reach their sales goals through a consistent, measurable sales coaching program.**



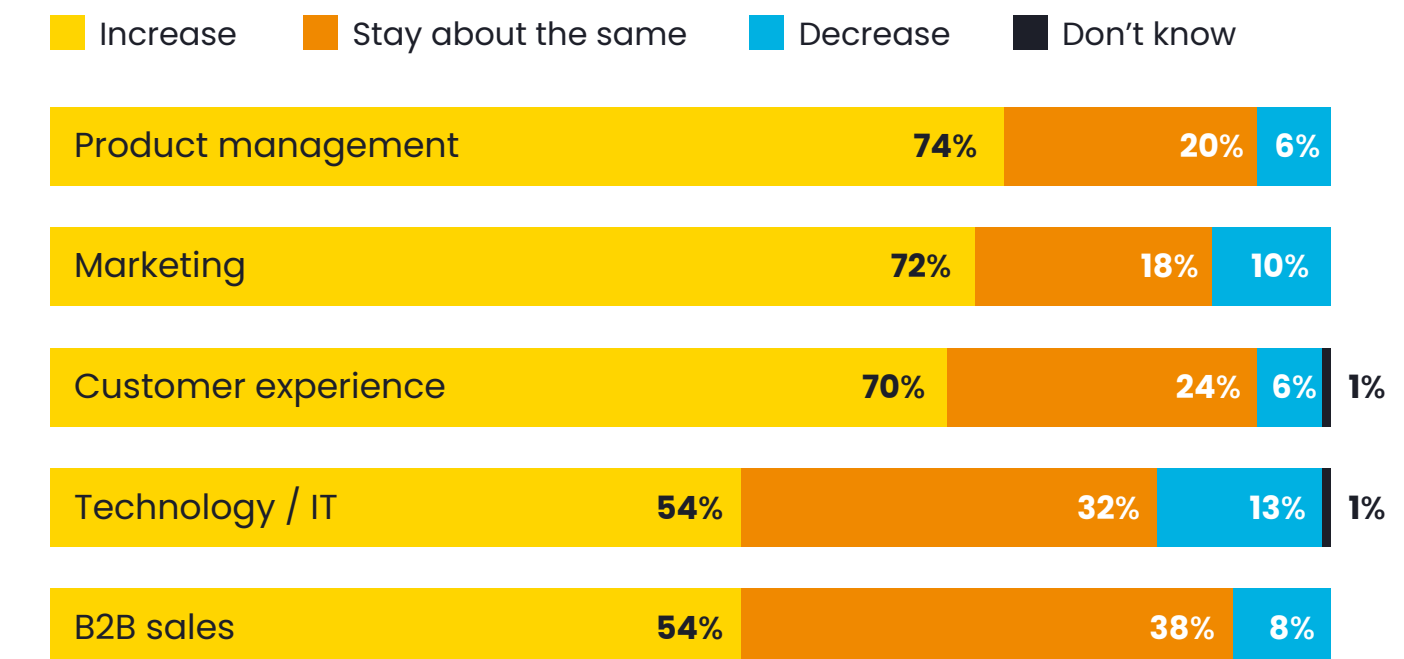
CHAPTER 02

What the Data Says About Sales Coaching

Sales headcount is not growing in many industries right now. Companies are instead investing in the people they do have by prioritizing coaching programs, enablement and training, and sales productivity tools in 2023.

Planned Changes In Organizations' Budget In The Next 12 Months Related To Personnel

Respondents who planned or anticipated a change in their organization's investment in personnel in the next 12 months by functional area



Where to Increase Investments in 2023

Talent and productivity

Examples:

- Talent acquisition
- **Coaching programs**
- **Sales productivity tools**

Source: Forrester



5 Ways the Industry's Most Forward-Thinking Revenue Leaders Are Preparing for 2023

Find out how sales leaders from Zoom, Crunchbase, Paycor, CompanyCam, and Ambition invest in and leverage sales tools to build elite coaching programs and hit revenue goals.



Will Reyes
SDR Manager



Sawyer Ritz
Director of Sales



Michael Plunkett
Senior Regional Sales Director



Sarah Linich
Sales Manager

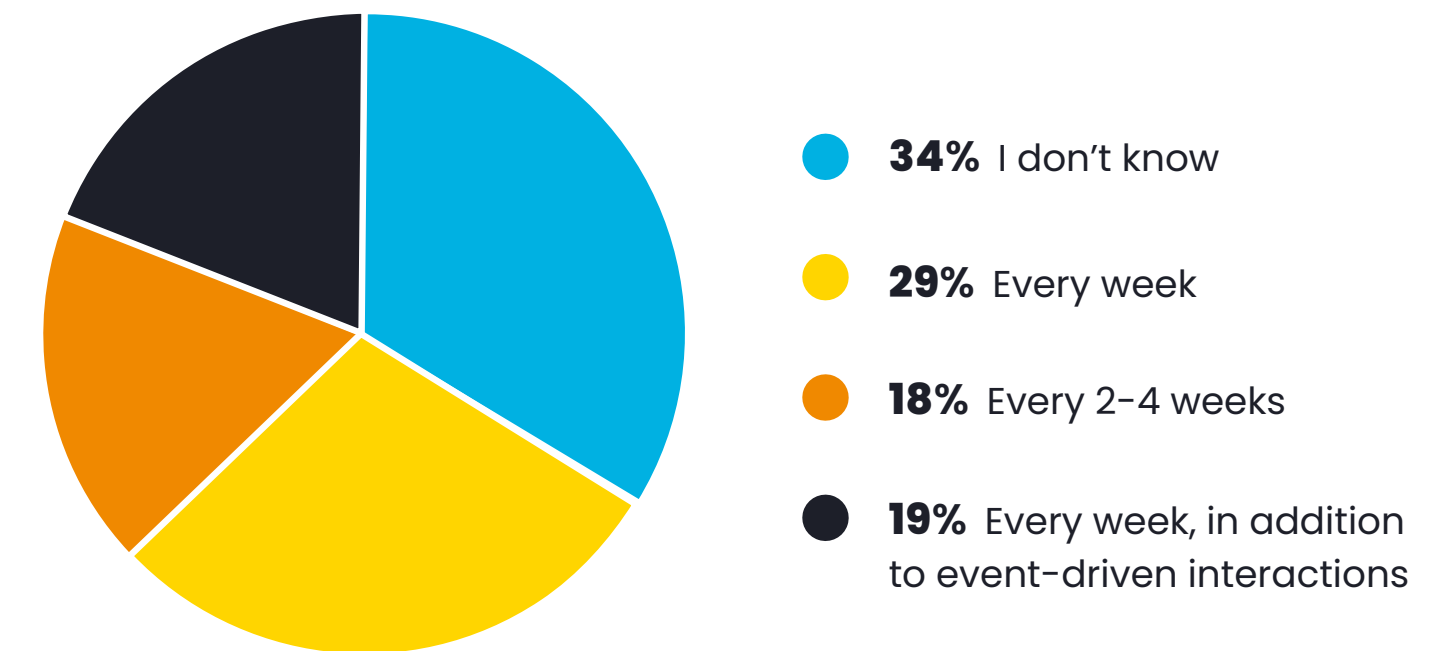


Mark McWatters
VP of Enterprise Sales



These investments couldn't be more timely. Coaching has a top-line impact that increases revenue metrics 5% YoY, yet **34% of revenue leaders don't know if coaching happens at their organizations**. Without this visibility, coaching moments are lost, conversations go undocumented, and there's no way to measure the impact of coaching on sales performance.

How often are your managers having coaching conversations with reps?



According to Ambition-sourced data, sales coaching has a top-line impact that increases revenue metrics 5% YoY—and a glaring 34% of revenue leaders don't know if coaching even happens at their companies.

STATE OF THE INDUSTRY SURVEY, FALL 2022, AMBITION

An investment in **sales coaching software** provides a holistic view of coaching for sales leaders, coaches, and enablement. This level of visibility serves as the foundation for sales organizations to scale their coaching efforts, **track performance**, and **achieve outcomes**.



CHAPTER 03

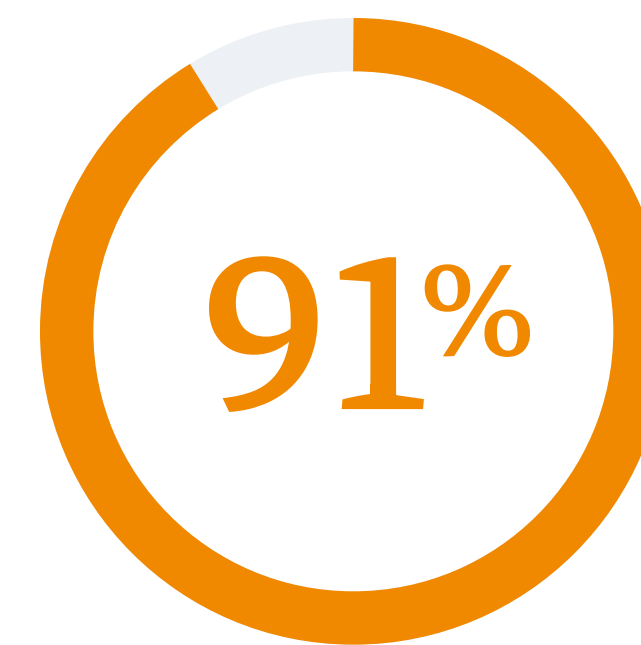
Why Sales Coaching is Important

Sales coaching is a critical investment for any business that wants to improve sales performance, increase productivity, and stay competitive in their industry. When done consistently, sales coaching will:

- **Improve sales performance:** Sales coaching can help salespeople develop the skills and knowledge needed to be successful in their role, such as understanding customer needs, identifying and [handling objections](#), and building relationships. This results in increased sales and revenue.

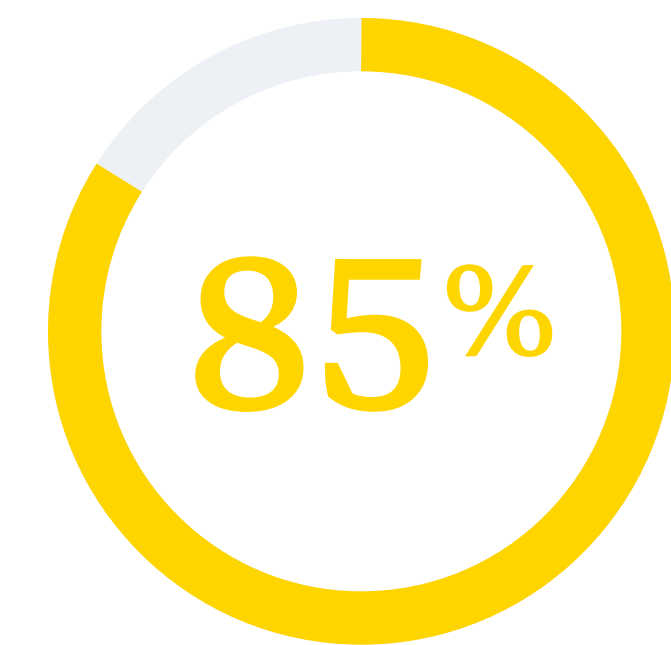
How Sales Coaching Impacts Quota Attainment

Source: RAIN Group



91% quota attainment

Companies with a formal sales coaching strategy



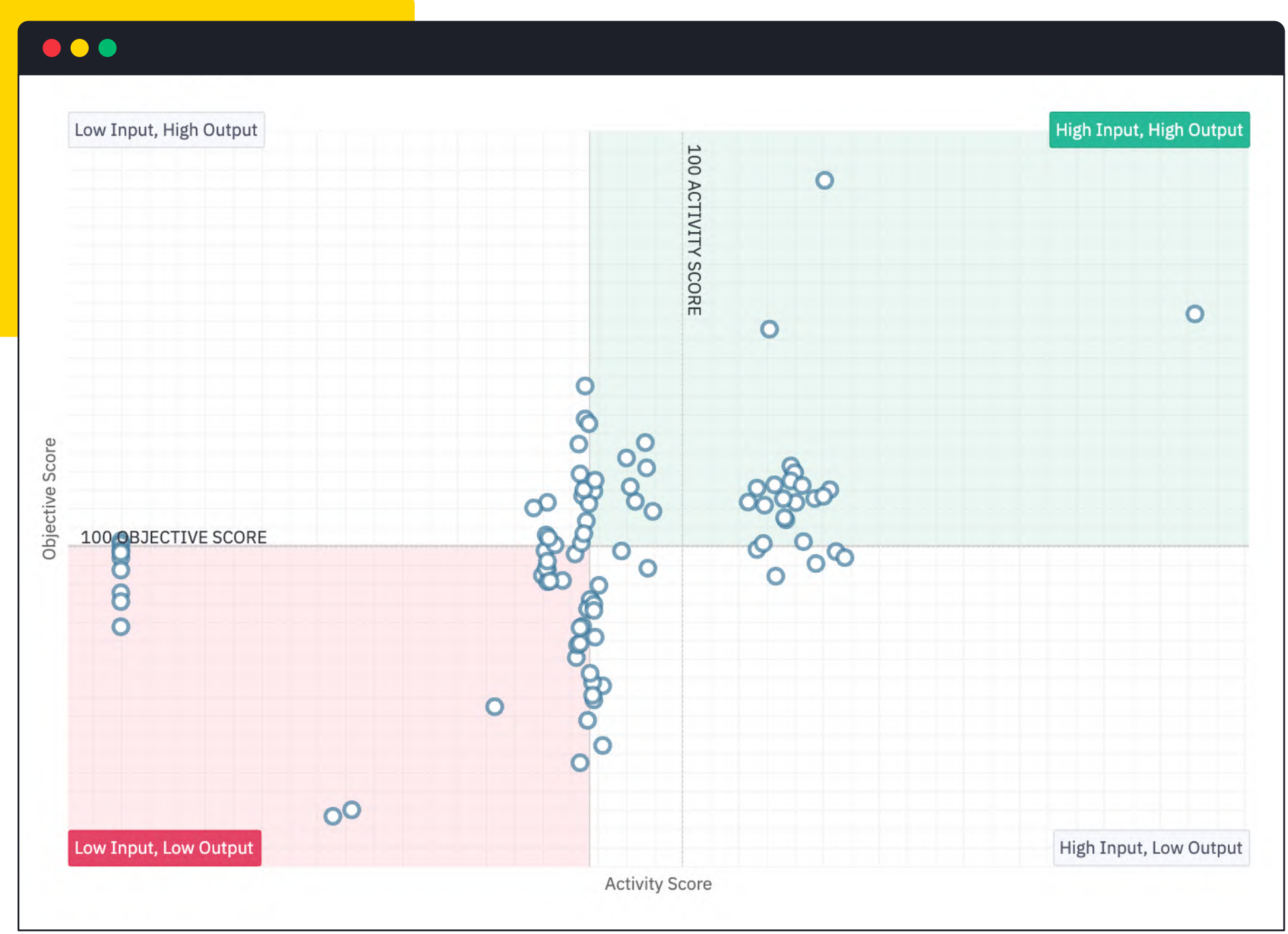
85% quota attainment

Companies without a formal sales coaching strategy



Identify areas for improvement:

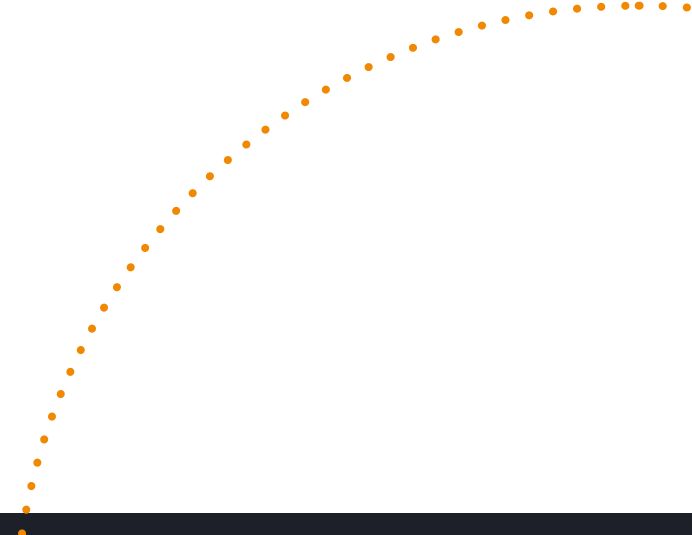
Sales coaches can offer valuable feedback to the salesperson during coaching and work with reps to develop short and long-term goals and [action plans](#).



ACTIVITY LEADERS				
	CALLS THIS MONTH	APPOINTMENTS SET THIS MONTH	PIPELINE CREATED THIS MONTH	
1 ST	YOLANDA SANTIAGO	2.3K	27	\$95.6K
2 ND	EFREN FLORES	1.5K	11	\$65.1K
3 RD	AMELIA OLSEN	1.5K	10	\$73.5K
4 TH	MISTY NAVARRO	1.5K	13	\$86.4K
5 TH	SHEILA YORK	1.5K	16	\$89.3K
6 TH	BROOKE O'CONNOR	1.5K	26	\$80.9K
7 TH	WILLIAM TRAN	1.5K	16	\$85.1K
8 TH	RAPHAEL KHAN	1.5K	16	\$80.9K
9 TH	RUSSELL TANG	1.5K	16	\$77.3K
10 TH	NOLAN WILEY	1.5K	9	\$63.5K

Increase productivity:

Consistent coaching establishes positive accountability and drives productivity. Salespeople will not only feel empowered to put new skills and techniques into practice; they will also feel motivated to complete action items and [scorecards](#), thus increasing productivity.



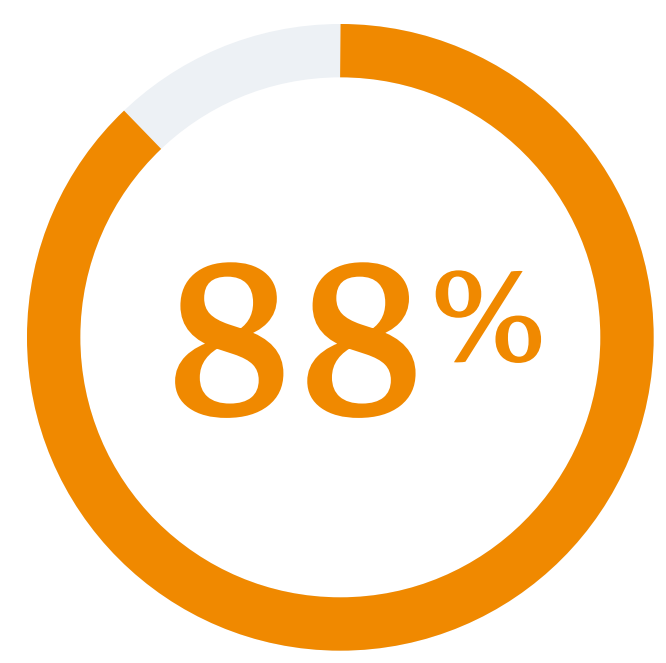


- **Enhance career development:**
Sales coaching can help salespeople advance in their careers by providing them with the skills and knowledge needed to take on more complex and higher-paying sales roles.
- **Enhance team performance:**
Sales coaching benefits sales teams as a whole, as it creates a culture of continuous improvement and learning, which results in better performance and increased revenue.

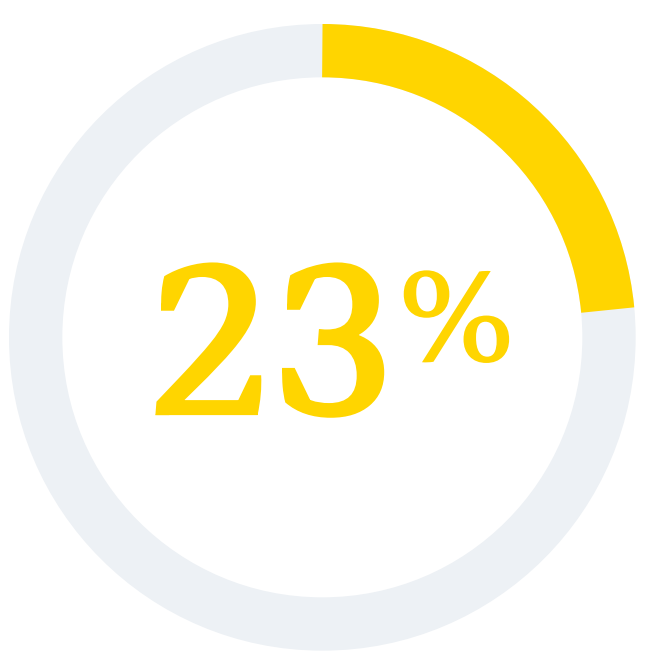
- **Help adapt to new market conditions:**
Sales coaching can also help salespeople adjust to changes in the market, such as new technologies or shifting customer needs, which can be crucial to maintaining a competitive edge. This is more important than ever before. The market is changing day to day and quarter to quarter. To help your teams remain agile, sales enablement and sales coaches should partner closely to reinforce new training via individual 1:1 coaching, group coaching, and measurable enablement programs.

Maximize Enablement Effectiveness with Coaching

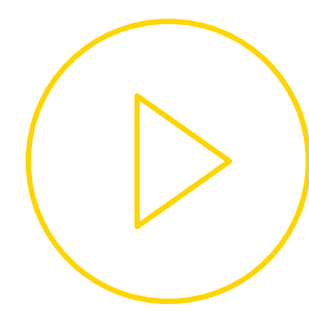
Source: Centre for Management and Organizational Effectiveness



Training + Coaching
88% Productivity Increase



Only Training
23% Productivity Increase



Modernizing Enablement: How to Train Your Sellers to Articulate Purpose

Hear how sales enablement partners with sales coaches, managers, and the full GTM function to coach, train, and measure enablement effectiveness.



Jonas Taylor
Manager, Global Revenue Enablement



Mallory Lee
VP Revenue Operations



Josh Scott
Manager, Enablement



Erin Tomlinson
VP of RevOps and Enablement





CHAPTER 04

How to Orchestrate a Sales Coaching Program

In order to be successful, coaching programs must be consistent, data driven, and measurable.

Consistent:

Individual and group coaching happen on a [recurring basis](#), and each salesperson is coached with the same basic framework. This ensures alignment across the organization and gives each rep equal opportunity to grow and hit goals.

Data driven:

Look at performance metrics, goal progress, and call data to guide coaching conversations. This ensures your time is spent productively.

Measurable:

Your sales coaching software should be able to show you who's being coached, how often, and how effective your managers and enablement programs are. Measuring coaching effectiveness gives you the insight to know how to optimize and iterate on your coaching strategy when needed.

While these core qualities must be in place for successful coaching, you can execute your coaching in a variety of ways. Let's look at the different types of sales coaching.



Four Approaches to Sales Coaching

1

Directive sales coaching

- A prescriptive approach in which a sales coach gives direct instructions on how a rep can improve their performance
- The coach offers guidance on specific techniques and strategies that a salesperson can use to close deals, handle objections, manage pipeline, etc.
- Leaves the rep with a clear set of actions they can take to improve performance

Directive sales coaching in action:

Create action plans within a coaching check-in that outline specific activities and habits that will help a rep be more successful and effective. Documented action plans establish accountability. Action plans serve as time management tools that help sellers stay focused on the activities that will drive results.

2

Developmental sales coaching

- Focuses on coaching the whole person
- Emphasizes self-discovery and encourages the salesperson to take ownership of their growth
- The sales coach asks questions that help the seller come to conclusions on their own and take the best action for their selling style

Developmental sales coaching in action:

Take a 360-degree approach and focus on coaching the whole person. Did a rep mention something fun or exciting they had planned for the weekend? Ask them about it. Were they nervous about a specific call or demo? Ask them why and how it went. When you learn what makes each individual rep tick, you have the power to help them reach their peak potential at work and in life.

3 Formal sales coaching

- Happens at a regularly scheduled time, frequency, and may be geared toward a specific topic
- Necessary for running a successful, measurable coaching program
- The sales coach uses this time to follow up on previous action plans and review performance metrics on a consistent basis
- Establishes accountability and has a measurable impact on KPIs

Formal sales coaching in action:

Recurring 1:1 and group coaching sessions, pipeline reviews, pre-call planning sessions, and other regular touchpoints between the sales coach and their people.

4 Informal sales coaching

- Happens in real-time when managers see a dip in performance, notice new enablement has not been applied successfully, receive feedback from internal or external sources, or have reps ask them for support
- Offers valuable opportunities for real-time feedback and learning

Informal sales coaching in action:

A rep may ask a sales coach for an off-cycle role-play session to practice before their next client call. The sales coach takes the role of the client and helps them proactively navigate the upcoming conversation, rather than retroactively judging past performance.

Sales Coaching Methods

— **One-on-one coaching:**

A sales coach works with an individual salesperson to improve their performance. This can be done in person, over the phone, or via video conferencing.



1:1 Coaching Framework

Start running more consistent, metrics-based 1:1 coaching sessions and increase coaching and seller effectiveness with our free coaching templates.

— **Group coaching:**

This method involves a coach working with a small group of salespeople to improve their performance. This can be done in a workshop setting or through ongoing [group meetings](#).

— **Self-paced learning:**

Some companies provide sales coaching through self-paced online training programs. This can include video lessons, quizzes, and other interactive elements.

— **Mentoring:**

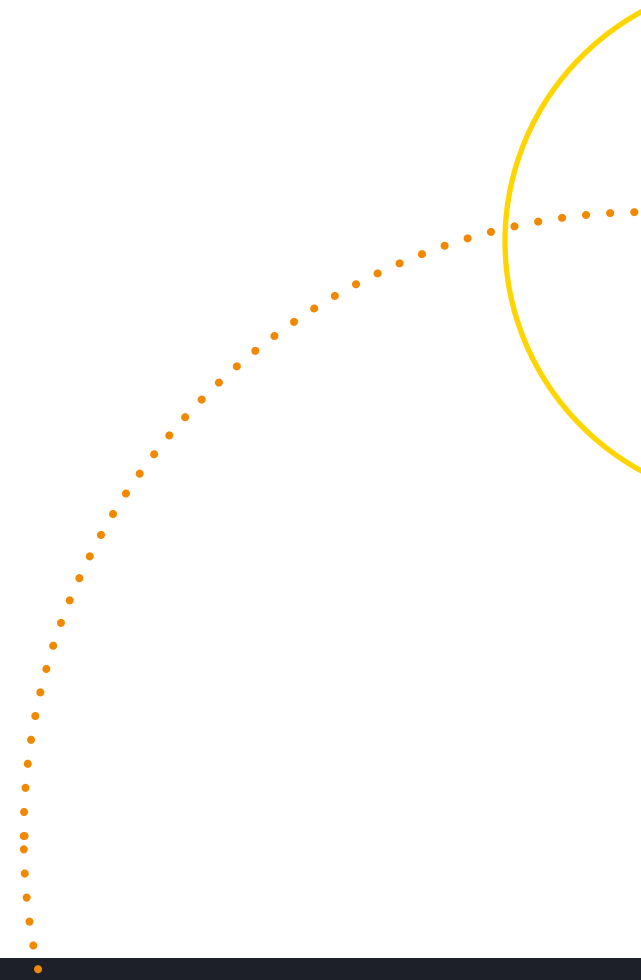
This method involves pairing a less experienced salesperson with a more experienced one who can provide guidance and feedback in the field.

— **Role-playing:**

This method is a common sales coaching technique where the coach and salesperson act out different scenarios that may happen during a sales call. This helps the salesperson to develop the necessary skills to handle those situations.

— **Gamification:**

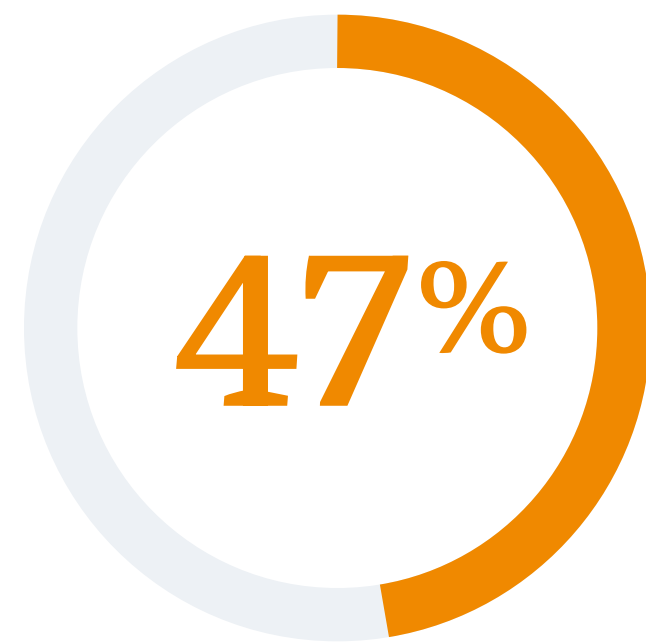
[Competitions](#) make learning more engaging and incentivize salespeople to practice new skills. [Tracking goals](#) throughout the competition also results in just-in-time, informal, and peer-to-peer coaching opportunities.





Coaching Agendas, Disciplines, and Tactics

Building coaching strategies in the face of aggressive revenue targets can feel overwhelming. What types of coaching should you include? How often should you coach? How can you measure success? Use these basic coaching disciplines, tactics, and best practices to get started.



47% of sales managers spend less than 30 minutes per week coaching reps on skills they need to be successful.

Top 3 Coaching Questions of 2022

1. What do you need from me?
What can I do better as your leader?
2. Share your thoughts on how things went regarding last week's performance.
3. How are you taking care of yourself this week?



1:1 Coaching

1:1 coaching happens at a regular cadence between the sales coach and the salesperson. During a 1:1 coaching session, the sales coach and rep will review performance metrics, specific opportunities or deals, and challenges.

Frequency

Weekly

Duration

1 hour per rep. This can be broken into two 30-minute sessions: one check-in, and one strategy session.

Example Agenda: 1:1 and Strategy Coaching

1:1 Check-in

1. Check-in with your rep to see how they're doing outside of work. This builds trust and reminds reps that you care about them as a person.
2. Discuss which short-term goals your rep should complete within the week to pace them toward larger goals.
3. Discuss potential roadblocks and create a plan to help remove that obstacle.

1:1 Strategy Session

1. Review rep-selected calls, ask reps to identify what made those calls successful or unsuccessful, and coach accordingly from there.
2. Map out the details of a rep's key accounts and create a strategy to lock in/retain those accounts.
3. Practice skills like negotiation, moving stuck deals, and objection handling with reps so you can offer real-time feedback and guidance.

Group Coaching

Group coaching brings your whole team together to discuss and workshop specific skills. These sessions are incredibly valuable because they foster an environment of encouragement, continuous learning, and organic peer-to-peer coaching moments.

Frequency

Weekly or bi-weekly (Group coaching sessions can take many forms—call camp, forecasting, deal reviews, etc.—so the frequency may vary.)

Duration

1 hour

Example Agenda: Deal Review

1. Review closed/won opportunities and discuss as a team
2. Review closed/lost opportunities and discuss as a team
3. Review pipeline
4. Review quarterly forecast

Group Training

Sales training programs should be ongoing, but you should aim to run one formal training per month. These can happen in person or virtually and may include an element of independent learning. While training programs can vary in length and duration, here's a glimpse of what a product training might look like

Frequency

Monthly (This may vary depending on the type of training program. One monthly touchpoint is standard.)

Duration

1 hour

Example Agenda: Product Training

Level One – The Why

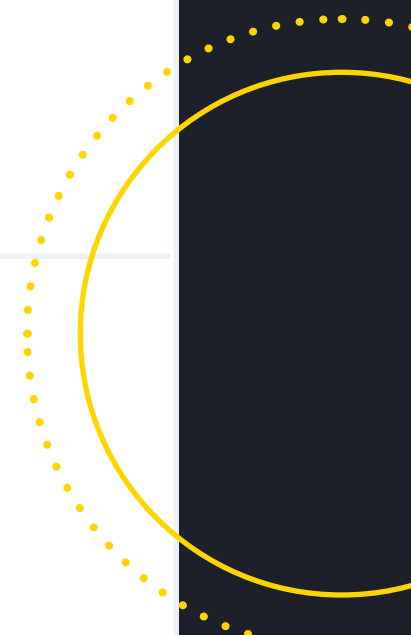
- What product is launching?
- Why is it valuable to prospects/current customers?
- How does it fit into the company story/narrative?
- What are our goals for adoption and new sales?

Level Two – The How

- How should this product be demoed to new customers?
- How should this product be presented to existing customers?
- How does the product work?
- What are some FAQs you might get from prospects/customers?

Level Three – The When

- When is this rolling out?
- What resources are available to you?



Deploying Your Coaching Orchestration Strategy

1 Define your cohorts

Organizing your employees into different hierarchies allows sales enablement to assess and address performance by different cohorts. Does one manager lack coaching skills? Is there a problem at the geo level, or is there a whole department that needs training? Cohorts allow you to make assessments at the group level and deploy strategies accordingly.



Sales Scorecard Templates

Use our built-in formulas and KPI calculator to help reps hit monthly objectives, build pipeline, and crush quota.

2 Build a scorecard

Work backwards from your end goal to outline activities, objectives, and key results for your reps. Appropriately benchmark these activities and objectives by using historical conversion rates. Make these goals visible in a [scorecard](#) so everyone understands how their individual targets ladder up to team goals.

- **Set yearly, biannual, or quarterly team goals, such as:**
 - Renewal and expansion targets
 - Net dollar retention
 - Net new sales
 - Pipeline generated
- **Identify efficiency/conversion metrics that you specifically want to improve with a coaching program**
- **Establish your cadence—weekly, bi-weekly, etc.—and make it consistent. You cannot measure results without consistency.**
- **Use a template of questions geared toward moving the specific metric you want to focus on.**
- **Survey your reps anonymously to ensure the quality of your check-ins are helpful. Your reps are your most important stakeholders here.**
- **Measure effectiveness by showing:**
 - A lift in the metric you set out to impact
 - Completion of the coaching activities defined by your committed cadence
 - Program quality via anonymous survey ratings and metric increases
 - Activity and objective scorecard attainment

3 Measure and optimize your coaching program

Measure coaching **accountability**

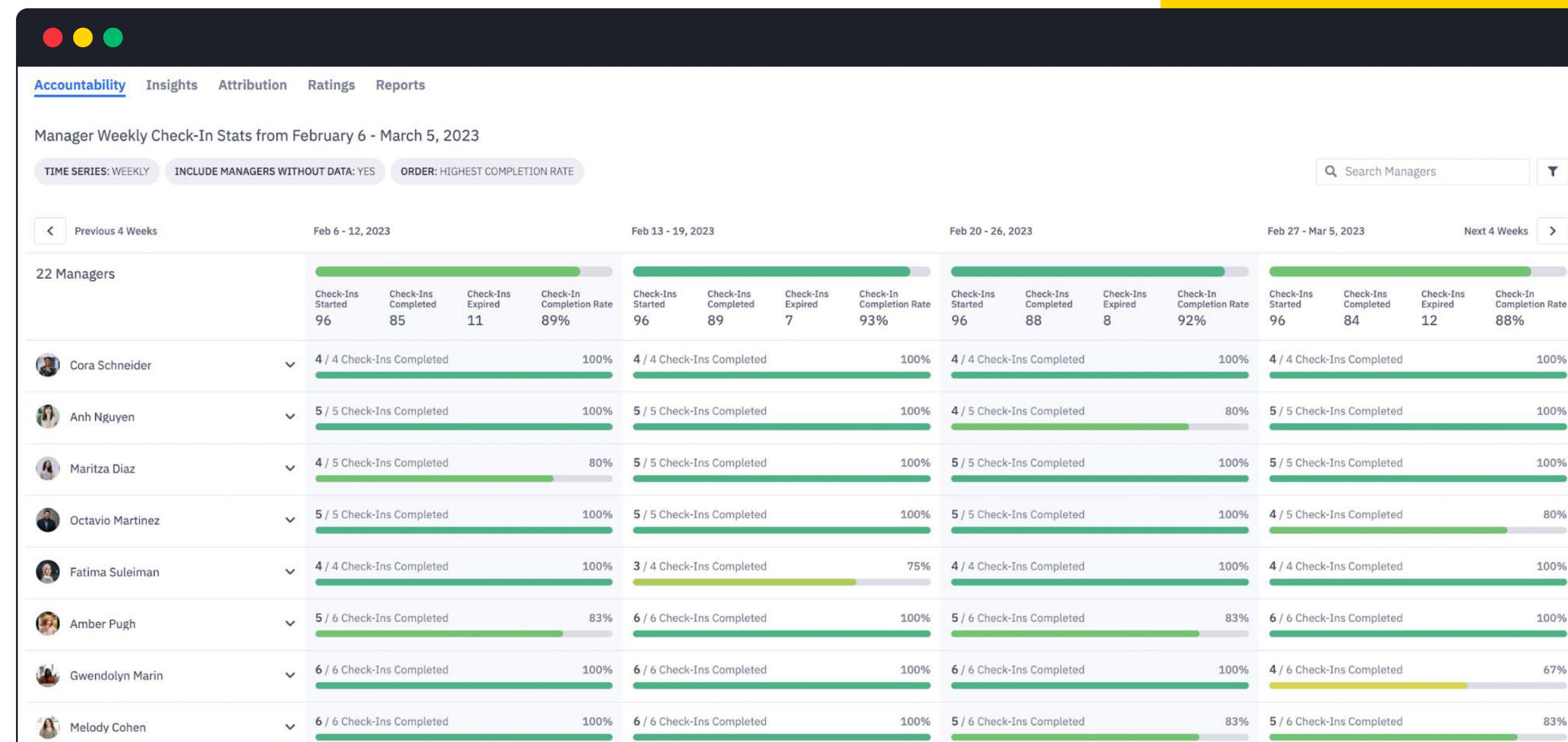
Because so many sales managers coach infrequently or not at all, you must hold managers accountable to sales coaching adoption. Just like sales reps must complete activity scorecards, managers must complete coaching activities. Track how many they complete each week in your [sales coaching platform](#). Consider tracking these activities for your managers:

- Coaching 1:1s
- Team coaching sessions
- Call reviews
- Rep activity attainment for the day

Measure coaching **quality**

How do we measure quality? Outside of hitting quota, there isn't a standard outline or set of KPIs that show the efficacy of sales managers. As we continue to [survey sales managers](#) and reps and talk to sales directors and leaders, we've identified [4 standard KPIs](#) that will help you measure sales coaching impact—so it's clear to your team (and leadership) just how to measure an effective sales manager:

- Coaching activities completed
- Quality of coaching
- Percent activity lift
- # reps on pace to quota





Measure coaching effectiveness

Measuring effectiveness requires measuring efficiency. How well is coaching applied? Tracking efficiency metrics will help you understand the effectiveness of coaching and give clear, actionable insight into what still needs improvement. You can start tracking efficiency metrics such as:

- **Conversion rate of connects to meetings set:** tells you if your reps pitch is working to get meetings
- **Conversion rate of meetings held to next step:** tells you if meetings progress successfully to the next stage
- **Conversion rate of opportunity to closed won:** tells you if reps need to improve closing skills
- **Conversion rate of outbound emails to replies:** tells you if the email language is working
- **Conversion rate of LinkedIn connections to meetings set:** tells you if social selling skills are there
- **Conversion rate of sales qualified leads (SQLs) to discovery meetings set/needs further analysis:** tells you if your reps are able to turn highly qualified leads into an actual meetings or next steps

Onboarding Coaching Cadence Syllabus

Introduction

Onboarding Objectives

Develop deep product, process, industry, and landscape knowledge

Onboarding Graduation Requirements

Complete all coaching tasks

Hit all ramping targets

Hit all activity and objective requirements

Tools Needed

All coaching takes place in Ambition and will leverage [integrations](#) with:

- Gong
- SFDC
- Lessonly/Seismic
- Outreach

Targets

Targets ramp each week and will live on your Ambition Scorecard. Your target for the onboarding period (~ one month) will be to source 10 opportunities.

Notes

One team. One dream. Your teammates are here to help you. Ask questions at any time!

Schedule

Week 1

Introduction to company

Tool, methodology, and process

Messaging and market

Week 2

Shadowing and role play

Self-study research

Activity and objective ramp goals

Week 3

Go live!

Continue self-study research

Cold call pitch certification

Week 4

Goals and targets ramp

First Call Camp

Pitch V2

Week 5

Goals ramp

Competitor test

Week 6

Goals ramp

Top industries test

Graduate!



Coach. Track. Achieve.

Behind every great sales leader is Ambition's Sales Coaching Platform. Facilitate more consistent coaching, build recurring training programs at scale, and make your team more productive and effective.

