

Rain Group's 5-step Coaching Template

What should individual sellers on my team do differently?

Fill out for each seller on your team. Type the name of each seller and add bullets in each area for what they are doing now, should do differently, and the impact of the changes for each person.

Name	Sandra Jones
Doing Now	<ul style="list-style-type: none">• Prospecting intermittently, 3-5 hours a week• Lacking proactive focus on top 3 accounts
Do Differently	<ul style="list-style-type: none">• Prospect in focused sprints for a minimum of 8 hours a week• 3 solid account plans, executed proactively
Impact	<ul style="list-style-type: none">• <1 meeting set per week to 2 or more; pipeline doubled in 4 months• \$500,000 across these accounts to \$1.2 million in 1 year

What should my team as a whole do differently?

Summarize the top 3 to 5 areas your team as whole needs to do differently to raise the bar on team success.

Doing Now	<ul style="list-style-type: none">• Top pursuits aren't organized, win rates are suffering
Do Differently	<ul style="list-style-type: none">• Identify pursuits to <u>Win Lab</u> each week with each person; 1 shared team Win Lab per week• Sales opportunity / Win Lab training
Impact	<ul style="list-style-type: none">• Increase win rate on proposed sales from 44% to 51%; this one change drives sales from \$7,500,000 to \$9,200,000 in sales won this year, which would put us in the top 10% of sales teams

My Sales Coaching Rhythm Develop or refine your sales meeting coaching rhythm.	Hours Per Week
Daily Meetings	
Quick checks and huddles: 10 minutes per day	1
Weekly Meetings	
<ul style="list-style-type: none"> • Accountability checks (individual): 10 minutes per week • Win Lab deal reviews (individual): 1-2 per week / average 30 minutes each • Sales meeting (team): 1 per week / 60 minutes 	2.5
Bi-Weekly Meetings	
<ul style="list-style-type: none"> • Pipeline review (individual): 1 hour • Core coaching (individual): 1-on-1 check-in / 30 minutes 	.75
Monthly Meetings	
<ul style="list-style-type: none"> • Review plans, results, accountabilities (individual): 1 hour 	.25
Quarterly Meetings	
<ul style="list-style-type: none"> • Quarterly summary and strategy (team): 1.5 hours • Team building meeting / training: 1.5 hours 	Less than .25
Average time in meetings per week per seller	Approx. 5 hours

Overall Areas for Development Focus
<ul style="list-style-type: none"> • Lead more thorough and effective needs discoveries
<ul style="list-style-type: none"> • Make the ROI case compellingly
<ul style="list-style-type: none"> • Create and present highly-effective proposals
<ul style="list-style-type: none"> • Become much better at large opportunity pursuit intensity

Skills, Knowledge, Attributes	Proficiency Low 1 – 5 High		Plan to Develop Including training and coaching	Testing for proficiency
	Now	Target		
Skills				
Influencing Buyer Agenda	3	4	Advanced Consultative Selling skills training	Call reviews
Knowledge				
Insight about financial services industry	3	5	Weekly reading and discussion of industry news; get subscription to 2 leading magazines	Discussions during coaching; knowledge share to team at monthly meetings
Attributes				
Motivated and productive	2	5	Attend <u>9 Habits of Extreme Productivity</u> program	Weekly action plans and reviews; calendaring Investment time

My Accountability Partner's Name	Marty James
Report Progress on (Day / Time)	Fridays at 12:00
<p>Top 3 to 5 Priorities Next 90 Days No more than 5. Star/Bold the most important priority.</p>	<ul style="list-style-type: none"> • Completely focus the team on highest impact activities every day • Greatly increase frequency and success of Win Lab deal reviews to increase win rate • Increase sales meeting effectiveness with better conversation skills • Manage pipeline so only real opportunities get focus, and most time is spent on them • Drive pipeline with better prospecting skills and actions across team
<p>Objectives This Month Keep list short. Star/Bold the most important priority.</p>	<ul style="list-style-type: none"> • Implement <u>Coaching for Action and Accountability</u> to focus everyone's time and effort • Install new coaching meeting rhythm • Make sure everyone gets great at Win Lab deal reviews • Cut out 5 to 10 hours per week crowding my schedule with non-value-add activities

How My Coaching Will Be Different

What I will change to make my coaching most effective.

- I'll be much more intentional about how I work with the team
- Will focus on 3 key areas: prospecting, sales conversations, and Win Labbing
- Will focus much more on action and accountability; not just giving advice, but executing
- Will double my coaching time per month vs. ad hoc meetings and reporting

Success Metrics

How I'll measure progress and know I'm successful.

- Win rate on proposed sales from 45% to 51%
- Increase weighted average pipeline of team by 30%
- Increase conversion from first meetings to qualified opportunities by 10%
- Increase average size sale by 5%
- Increase team members achieving plan from 70% to 90%

Action Plan

Specific next steps for implementing My Coaching Plan.

What	When	Status		
		Not Yet Started	In Progress	Complete
Set up weekly plans and accountability checks with team	Sales meeting this week	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roll out coaching rhythm and schedule individual meetings	Sales meeting this week and just after	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create a schedule of rolling out strategies and hacks to use with team from the Coaching Checklist; add each agenda for next 3 months of sales meetings in 15-minute segments	October 28	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ride along or review recordings of needs discovery meetings of each team member and create improvement plans	November 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>