

# Coaching for Effective Team Selling

1 Day

## COURSE OVERVIEW

*Coaching for Effective Team Selling* is a one-day training program for Team Leaders and Managers who manage salespeople to give them the skills to reinforce effective sales behaviors. The program focuses on giving managers the skills and processes to coach teams of Account Executives, Portfolio Managers, and Product Specialists to maximize the effectiveness of their time with the customer. Specifically, managers will be able to work more effectively with the team members to help them:

- Increase the quality of their account strategies
- Improve their call plans to help achieve their strategies
- Apply the Skills for Making High-Quality Calls consistently in every customer interaction

Managers will complete the program with skills that will help them:

- Know the skills they will need to coach
- Have some level of proficiency at demonstrating use of the skills
- Have first-hand experience with the simulation their people will go through
- Provides them with structure for meeting with each of their people as part of their sales process
- Assess the skills of each of their sales people as a benchmark for developing their skills through coaching
- Assess their own coaching skills and reflect on their own coaching routines and practices

The managers build their skills by taking part in discussions about coaching, doing exercises and conducting role-plays in which they practice coaching, a planning discussion and a feedback session. After the program, the managers can create performance development plans for each of their direct reports in the areas of planning, selling, and team effectiveness. In addition, they can set specific plans for conducting coaching sessions on a regular basis.

## WHAT WILL I GET OUT OF IT?

As a result of this program, the Financial Institution can expect to see managers:

- Helping their teams to improve their account and call planning
- Making joint calls with their team members and providing effective feedback about business development and selling skills
- Reinforce effective *Team Selling to Strategic Accounts*
- Fostering a team focus to help relationship managers differentiate the Financial Institution

Participants will be able to:

- Use a detailed, structured coaching process to coach their team members to improve their account and call plans

- Use a detailed, structured coaching process to coach their team members to improve their calling skills
- Observe selling skills in a customer interaction
- Provide effective feedback to improve sales performance

## WHO'S IT FOR?

Team Leaders or Managers who manage a team of sales people.

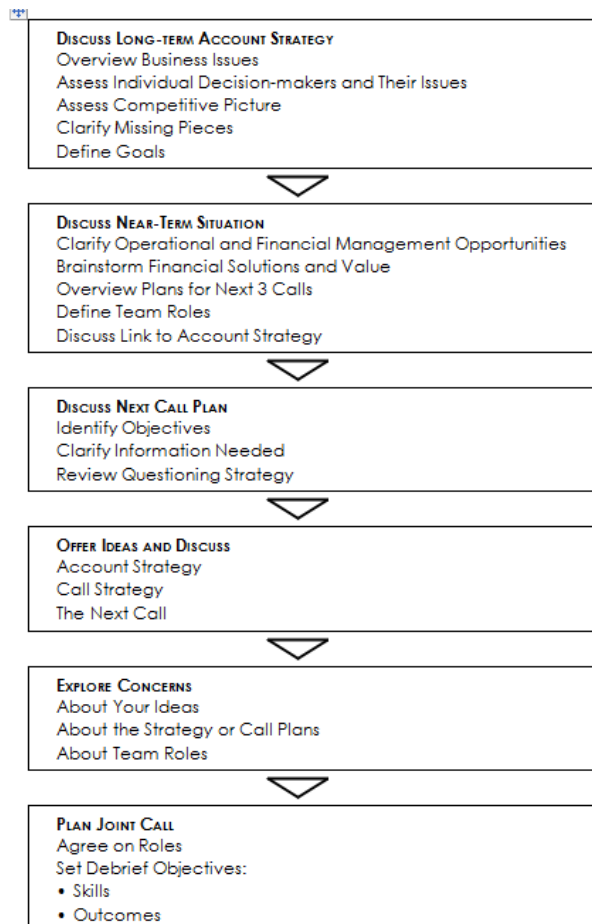
## COURSE CONTENT

The managers develop their skills by learning about core coaching processes and practicing using those processes. There are two core coaching processes:

- Account Strategy and Call Planning Coaching
- Sales Coaching

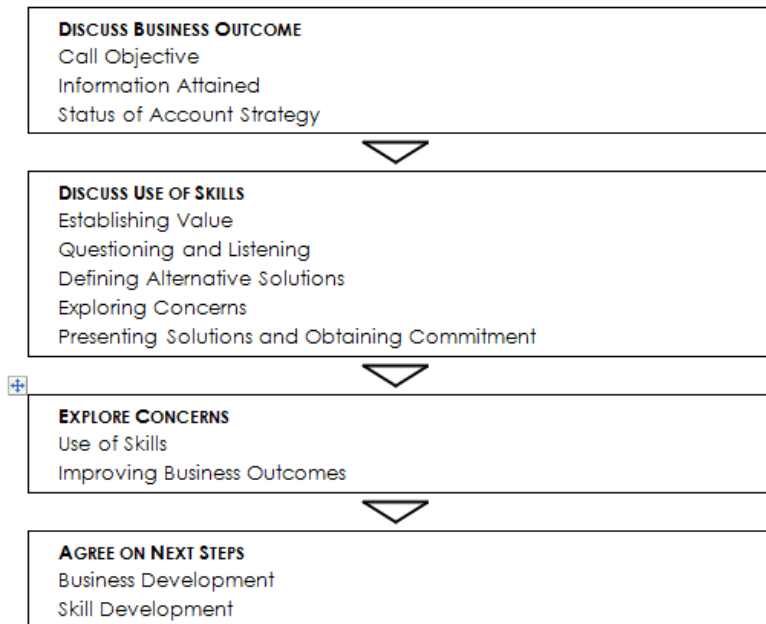
### Account Strategy and Call Planning Coaching

Managers use this process when coaching their teams on building and improving their account strategies and call plans.



### **Sales Coaching**

Managers use this process when coaching their team members after joint calls to help them improve their calling skills.



### **Providing Feedback**

In addition to the coaching processes, the managers will learn some guidelines to follow for providing feedback during a coaching session:

