SalesSmarts™ for Sales Managers

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Facilitator Resources

Table of Contents

Who Should Facilitate This Workshop?

Participants will expect facilitators of this workshop to be experienced sales managers and coaches who are exemplary models of the required skills, confidence and competence.

Facilitators, therefore, should be seasoned professionals who can draw on and share successful experiences in managing the sales process and managing and coaching sales professionals.

Suggestions for Prework

Assigning prework before the workshop can help engage participants in the workshop content even before they arrive. If you would like to include prework as part of the workshop design, we have included some suggestions below for integrating prework into the workshop.

Suggestion #1

Many participants may be in transition from positions as sales professionals to positions as sales managers. It's not an easy transition to make, especially if participants are now the managers of former peers. Provide a worksheet (available as an online resource at www.visionpoint.com) with two columns entitled Plus and Delta as prework. Instruct participants to write under the Plus column what is going well in the transition and under the Delta column what is especially challenging. During the workshop, ask participants to share their pluses and deltas and for suggestions on how they can move items from the Delta column to the Plus column.

Suggestion #2

Provide a copy of the *SalesSmarts™ Word Search* (available as an online resource at www.visionpoint.com) as prework. During introductions or early in the session, ask everyone to share thoughts, ideas, emotions or questions they have about the words and phrases they found. This word search can also be used as an energizer activity during a break, formed as a competition (e.g., first person or first team done wins a prize).

SMART-START® Activity
Using the SMART-START® Sales Truths Video

Time it takes: 30–35 minutes (15 minutes prior to session start time, 15–20 minutes after session begins)

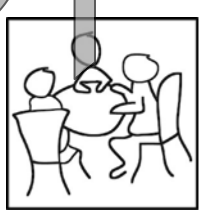
What it is about: Opening the session on a positive note

What you will need:

- Video: *SMART-START® Sales Truths*
- Index cards with three questions from Step 3 (below) written on them

How to do it:

1. Begin playing the *SMART-START®* video 15 minutes prior to the session start time. If you are using the DVD, set the control to automatically loop. If you are using the VHS, the video will repeat itself at least four times.
2. Turn the video off when you are ready to begin your session and explain that you will refer to it again later. After the participants have introduced themselves, you will use this activity as part of your introduction (either to conclude Step 1 or during Step 2).



3. Break the group into smaller groups of three to five people and ask them to talk within their groups to answer the following three questions on the index card:
   - What does selling mean to you?
   - Why is it so important to believe in the value

Optional Activity 1: Sharpen the Saw Skills Practice of the SalesSmarts™ S.A.L.E. Process

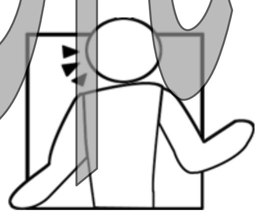
Time it takes: 45–60 minutes

What it is about: Applying the S.A.L.E. Process in skills practice scenarios and discussion

What you will need:

- *Handout #1 – SalesSmarts™ S.A.L.E. Process*
- *Handout #2 – Directions for Skills Practices of the S.A.L.E. Process*
- *Handout #3 – Scenario 1: Hillside Hospital, Sales Team Copy*
- *Handout #4 – Scenario 1: Hillside Hospital, Customer's Copy*
- *Handout #5 – Scenario 2: Master Technologies, Sales Team Copy*
- *Handout #6 – Scenario 2: Master Technologies, Customer's Copy*
- *Handout #7 – Scenario 3: Nation's Bank Corporation, Sales Team Copy*
- *Handout #8 – Scenario 3: Nation's Bank Corporation, Customer's Copy*

How to do it:



1. Introduce the activity by saying:

   In his book, *The 7 Habits of Highly Effective People*, Steven Covey entitles Habit #7 as "Sharpen the Saw." Covey uses the analogy of a woodcutter whose productivity falls off when his saw gets dull. The woodcutter needs to take time periodically to sharpen his saw.

Optional Activity 2: Identifying Your Sales Manager DNA

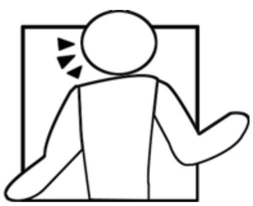
Time it takes: 45–60 minutes

What it is about: Identifying your Sales Manager DNA and discussion

What you will need:

- Flipchart easel, pad, markers
- *Handout #9 – Worksheet for Drafting Your Sales Manager DNA*
- *Handout #10 – Characteristics of Successful Sales Managers*

How to do it:



1. Introduce the topic by saying:

   In their workshop, *SalesSmarts™ for Sales Professionals*, your sales team identified their Sales Professional DNAs. You might enjoy identifying your Sales Manager DNA.

   We know from science that each of us is unique because of differences in what's labeled our DNA sequences—which is a scientific term for a nucleus of cells that distinguishes each of us from one another. We can extend the concept of our biological DNA to what we can coin as our Sales Manager DNA—DNA in this case standing for Distinguishing Nucleus of Attributes.

Optional Activity 3: Interview Skills: Ask, Listen, Clarify and Confirm

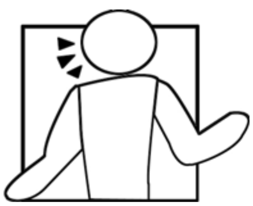
Time it takes: 45–60 minutes

What it is about: Reviewing guidelines for conducting effective interviews of candidates for sales positions and practicing conducting telephone interviews

What you will need:

- Flipchart, easel and markers
- *Handout #11 – Guidelines for Conducting Interviews*
- *Handout #12 – Directions for Interview Practices of Ask, Listen, Clarify and Confirm*

How to do it:



1. Introduce the activity by saying:

   Research shows that one of the top ten reasons sales managers fail is that they do not use effective interviewing skills to identify truly qualified sales professionals.

   The quality of your sales force obviously depends on the quality of the sales professionals you hire, which obviously depends on the quality of the interviewing process used to determine the most qualified candidate.

Optional Activity 4: Preparing for Effective Meetings with Your Sales Team

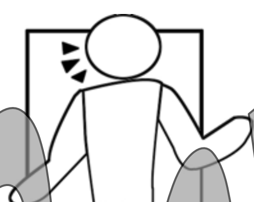
Time it takes: 45–60 minutes

What it is about: Discussing tips, techniques and tactics for effective meetings and practicing writing purpose, objectives and agenda items for a meeting

What you will need:

- *Handout #13 – Conducting Effective Sales Team Meetings*
- *Handout #14 – Preparing for Meetings*
- *Handout #15 – Practice: Writing Purpose, Objectives and Agenda for a Meeting*
- *Handout #16 – Practice Worksheet for Writing Purpose, Objectives and Agenda*

How to do it:



1. Introduce the activity by saying:

   Meetings are a medium through which sales teams communicate information, share ideas, plan sales strategies, solve problems, make decisions and follow through on commitments.

   When conducted effectively, meetings are powerful drivers to successful selling. When conducted ineffectively, meetings drain the energy of sales professionals, fail to capitalize on the richness of their diversity and talents and squander their time.

Optional Activity 5: Setting Performance Expectations

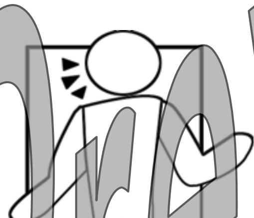
Time it takes: 45–60 minutes

What it is about: Discussing the role of sales managers in setting performance expectations for sales professionals, reviewing a sample of performance expectations and practicing drafting a list of performance expectations for sales professionals managed by participants

What you will need:

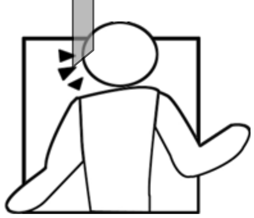
- Flipchart, easel and markers
- *Handout #17 — Guidelines for Setting Performance Expectations*
- *Handout #18 — Example of Performance Expectations*
- *Handout #19 — Worksheet for Drafting Performance Expectations*

How to do it:



1. Introduce the topic by saying:

   The most common reason why employees do not do what managers expect them to do is that employees do not know what managers expect them to do. Have you ever had that experience?



2. Ask participants:

   - **Have you ever worked for a manager who gave you so little information about performance expectations for your job that you had little or no idea about what**

Optional Activity 6: Practicing the Four-Step SalesSmarts™ Coaching Process

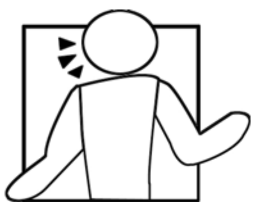
Time it takes: 45–60 minutes

What it is about: Practicing the Four-Step *SalesSmarts™* Coaching Process

What you will need:

- *Handout #20 – The Four-Step SalesSmarts™ Coaching Process*
- *Handout #21 – Practicing the Four-Step SalesSmarts™ Coaching Process*

How to do it:



1. Introduce the practices by saying:

In the workshop, *SalesSmarts™ for Sales Managers*, we practiced applications of the Four-Step *SalesSmarts™* Coaching Process. Professionals in any field of expertise will tell you that we can never get too much practice of our knowledge and skills.

I'm sure you've heard the adage that practice makes perfect many, many times. Another version of the adage is that perfect practice makes perfect. We'll never get to perfection as sales managers, but we can try to get as close to perfection as possible by continuously improving.

DVD Bonus Materials
Who, What, How and When

Bonus materials are provided to help facilitators supplement a training plan and prepare for an effective workshop. Bonus materials may be used before, during or after a session.

Bonus materials provided on the DVD for this program include:

What it is	How to use it
SMART-START® Sales Truths – A short video, ideal for kicking off or closing the training session.	See optional *SMART-START®* Activity for one way to use this video. Other activities are available in VisionPoint's *Beyond the Box* activity book available for purchase.
Vignettes-only	During a training session, review a particular video situation by using the vignettes-only feature to quickly access a specific situation without having to watch the entire video.
Trainer*TALK™*, an interview with Master Trainer, Sue Mueller	While preparing for a session, tune in to this interview for insights on how to best use VisionPoint programs.
Sales Insights, an interview with Content Expert, Matt Terronez, Vice President, VisionPoint Custom Solutions	During a break or as follow-up training, provide insights into coaching and the mindsets of successful sales managers.

PowerPoint® Slides, Flipcharts and Handouts

PowerPoint® Slides: For your convenience, we have included "thumbnail" icons of the PowerPoint® slides throughout the *Facilitator Guide* in the place that each slide is being referenced. Electronic copies and the most current versions of PowerPoint® slides can be found in the *Online Resources* at www.visionpoint.com.

Flipcharts: Flipcharts used in this program could be prepared in advance by the facilitator or during each activity by the participants. Electronic copies of flipchart templates can be found in the *Online Resources* at www.visionpoint.com.

Handouts: Masters of the handouts are found on the following pages. You may reproduce these documents as often as you like or use them as a starting point to create any other visual aid you believe would enhance the learning experience. Electronic copies and the most current versions of these handouts, along with any appropriate answer guides, can be found in the *Online Resources* at www.visionpoint.com.

Handout #1 – SalesSmarts™ S.A.L.E. Process

Set the Stage:

1. Plan:
   - The purpose of your call
   - Your knowledge about their business issues
   - The key decision makers
   - The customer's scope of operation
   - The customer's primary product or service
   - The customer's competitors
   - Your competitors
   - Your ability/the resources of your organization to win the business

2. Secure the initial meeting or appointment:
   - Background – about yourself and your organization, and to build rapport and credibility
   - Objectives – state your objectives in a way that positions you as someone whose solutions, products and services are worth considering
   - Alternatives – ask for alternatives the customer might be looking at
   - Time – set up a time to meet

3. Open the sales call/meeting:
   - Establish rapport – hellos, small talk, introductions, etc.; check on time available for the meeting
   - State the reason for your call – to learn roles/responsibilities of those at the meeting; to better understand the issues you believe they are facing
   - State the benefit/value to the customer – how you can help solve their issue
   - Check for acceptance – is there anything else to address during the meeting?

Handout #2 – Directions for Skills Practices of the S.A.L.E. Process

Directions:

1. The purpose of this activity is to practice the skills of Ask, Listen, Clarify and Confirm.
2. Your facilitator will ask you to form groups of three to four participants per group. The ideal size for each group is four participants. Fewer than three participants per group will not meet the purpose and procedures for the practices.
3. Each group will have two rounds of practice:
   - Each round is based on a sales scenario.
   - For each scenario, two participants will assume the role of the sales team, and two participants the role of the customers. Because of the number of participants, a group might have only one participant as a customer.
   - Your facilitator will give the sales team and the customers separate copies of a scenario for a sales call. The copies provide the sales team and the customer with the information they need to play their roles as realistically as possible in a simulation of a sales call. Customers have information that the sales team does not have. The sales team needs to pull the information from customers in order to analyze their needs. Sales teams do that through the skills of Ask, Listen, Clarify and Confirm.

Handout #3 – Scenario 1: Hillside Hospital, Sales Team Copy

Many small independent hospitals have been acquired by large tertiary care hospitals. Even among the large hospitals, the competition is stiff. So careful and resourceful strategic planning is critical. Hillside Hospital and Valley Hospital are two large competing hospital systems in the city of Metropolis. For a number of reasons, the advantage currently is with Valley Hospital. Hillside Hospital, therefore, needs to find a solution that will at least level the competitive playing field.

Handout #4 – Scenario 1: Hillside Hospital, Customer's Copy

Many small independent hospitals have been acquired by large tertiary care hospitals. Even among the large hospitals, the competition is stiff, so careful and resourceful strategic planning is critical.

Hillside Hospital and Valley Hospital are two large competing hospital systems in the city of Metropolis. The advantage currently is with Valley Hospital. Valley Hospital is the newer of the two systems; has a main campus location within the city boundaries of Metropolis, but proximate to wealthy suburbs; operates a number of clinics in suburban locations and has deep pockets for expansion.

Hillside Hospital, on the other hand, was founded in and remains in the inner city. The hospital's patient base is largely inner city residents who tend to be older and with a greater reliance on Medicare coverage. Suburbanites are reluctant to travel to Hillside because they perceive the hospital to be in a dangerous neighborhood. Hillside has only a few clinics in suburban locations.

You believe that Hillside has untapped market and revenue-generating opportunities. Although Metropolis is experiencing some of the problems of inner cities, its downtown area is still alive with many large and mid-size businesses and a major university. You believe that if Hillside were to establish a clinic in the downtown area, businesses and their employees would take advantage of the convenience of medical services such as:

- Minor emergency care
- Physical examinations and immunizations
- Pre-employment examinations and workers' compensation injuries
- Basic X-ray and laboratory tests

Handout #5 – Scenario 2: Master Technologies, Sales Team Copy

When Master Technologies was formed 75 years ago, the company hit the market with innovative products, quickly gained a loyal base of customers and achieved mutually respected relationships with suppliers. The company expanded quickly and tripled the original number of employees. Revenue growth was steady and significant. Product quality was outstanding. Morale was high and turnover was minimal.

During the past few years, however, the competition has been aggressive, and Master Technologies has experienced problems keeping up. Long time customers are switching allegiance to competitors who offer a greater variety of products, consistently upgrade products, deliver them more quickly, price them lower and service them faithfully.

It has been especially difficult for Master Technologies to design and develop new products and get them quickly into the market. As if that weren't enough, equipment is aging and requiring almost continuous maintenance.

Handout #6 – Scenario 2: Master Technologies, Customer's Copy

When Master Technologies was formed 75 years ago, the company hit the market with innovative products, quickly gained a loyal base of customers and achieved mutually respected relationships with suppliers. The company expanded quickly and tripled the original number of employees. Revenue growth was steady and significant. Product quality was outstanding. Morale was high and turnover was minimal.

During the past few years, however, the competition has been aggressive, and Master Technologies has experienced problems keeping up. Long time customers are switching allegiance to competitors who offer a greater variety of products, consistently upgrade products, deliver them more quickly, price them lower and service them faithfully.

It has been especially difficult for Master Technologies to design and develop new products and get them quickly into the market. As if that weren't enough, equipment is aging and requiring almost continuous maintenance.

You and your executive team members have decided that the need that is of utmost importance to the future of Master Technologies is the improvement of work processes for designing, developing, producing, marketing, selling and delivering new products.

Handout #7 – Scenario 3: Nation's Bank Corporation, Sales Team Copy

Banks face stiff competition from brokerage houses, insurance companies, investment corporations and online banking organizations. As competition stiffens, large banks obviously have more survival resources than small banks. Thus, there's a rash of mergers and acquisitions.

Nation's Bank Corporation has been a Titanic in the banking industry for 50 years. But there are signs of damage to the hull. People are becoming more and more savvy in ways and places to invest their money. So Nation's profits are beginning to dip, its customer base is decreasing and shareholders are beginning to check the number and locations of lifeboats should they decide to abandon ship.

Handout #8 – Scenario 3: Nation's Bank Corporation, Customer's Copy

Banks face stiff competition from agencies such as brokerage houses, insurance companies, investment corporations and online banking organizations. As competition stiffens, large banks obviously have more survival resources than small banks. Thus, there's a rash of mergers and acquisitions.

Nation's Bank Corporation has been a Titanic in the banking industry for 50 years. But there are signs of damage to the hull. People are becoming more and more savvy in ways and places to invest their money. So Nation's profits are beginning to dip, its customer base is decreasing and shareholders are beginning to check the number and locations of lifeboats should they decide to abandon ship.

Your new Director of Marketing has told you and your fellow senior managers that Nation's Bank has lost touch with its customers, that customer input is not a factor in determining priorities, implementing initiatives for growth or restructuring bank operations. You decide that a habit of neglecting customer input has to stop. But you don't know what to do about it. You're hoping that the sales team you are meeting with will be able to analyze your needs and offer possible solutions.

Handout #9 – Worksheet for Drafting Your Sales Manager DNA

Your Sales Manager DNA (**D**istinguishing **N**ucleus of **A**ttributes) can serve as a blueprint of your professionalism as a sales manager.

Directions:

1. Refer to the table on the next page. The table lists attributes (characteristics) of successful sales managers and categorizes the attributes as knowledge, skills and behaviors. Attributes under each category are not in any particular order, nor are they an exhaustive list.
2. Draft your Sales Manager DNA by selecting five attributes under each category. The 15 attributes you select will serve as the nucleus/core that you believe distinguishes you as a sales manager. Keep in mind that, while you cannot change your biological DNA, you can change your Sales Manager DNA again and again over time as you gain additional knowledge, develop new skills and enhance professional behaviors.
3. When you have drafted your Sales Manager DNA, your facilitator will ask you to meet with a small group of fellow participants to discuss your respective DNAs and to share reasons for your selection of attributes. You can amend your Sales Manager DNA based on discussions/feedback from participants in your group.

Time for the Activity:

- Draft your Sales Manager DNA – ten minutes
- Small group discussions – 20 minutes
- Large group debriefing – ten minutes

Handout #10 – Characteristics of Successful Sales Managers

Knowledge *They know . . .*	**Skills** *They are able to . . .*	**Behaviors** *They . . .*
❑ All that's known by successful sales professionals ❑ Practices and responsibilities of managing the sales process and managing sales professionals ❑ How to build and maintain productive revenue pipelines ❑ An effective system for account management ❑ Technological resources essential for success in sales organizations ❑ How to forecast revenue ❑ How to read and understand basic financial reports and trends	❑ Demonstrate all the skills of successful sales professionals ❑ Communicate goals and strategies to sales professionals clearly and persuasively ❑ Set individual goals and expectations for sales professionals ❑ Align sales strategy with business strategy ❑ Provide coaching and developmental feedback for sales professionals that builds their effectiveness and results ❑ Lead teams effectively ❑ Follow a systematic process in the solution of problems ❑ Build and sustain motivation and morale of sales professionals	❑ Demonstrate all the behaviors of successful sales professionals *(See table on preceding page)* ❑ Initiate and implement processes and procedures for integrating business strategies with sales strategies ❑ Demonstrate an obvious enthusiasm for helping sales professionals succeed ❑ Maintain balance in their dual roles of management and coaching

Handout #11 – Guidelines for Conducting Interviews

General Guidelines:

- The primary purpose of interviews is to evaluate the current skills of candidates and their ability to learn new skills
- Before conducting interviews, check with the Human Resources Department concerning your organization's policies, processes and procedures for recruiting, interviewing and hiring personnel
- A rule of thumb is that you will fill approximately 75% of open positions with individuals who have been referred to you or who are currently employed in other positions within your organization
    - Surprisingly, perhaps, few open positions are filled by individuals who respond to ads in newspapers or through the internet
    - Therefore, nurture a pool of professional contacts and a pool of potential candidates

Specific Guidelines:

- Conducting effective interviews is a skill that requires planning and practice
- Sales managers who don't invest time and preparation into the process risk hiring the wrong person or losing the right person
- Resist the temptation to assess the qualifications of candidates simply by having casual conversations with them. Effective interviews have a structure and pertinent questions about qualifications
- On the other hand, don't conduct interviews that are so structured, rigid and serious that they drive away qualified candidates

Handout #12 – Directions for Interview Practices of Ask, Listen, Clarify, Confirm

Directions:

1. The purpose of the activity is to practice the skills of Ask, Listen, Clarify and Confirm to assess a job candidate's qualifications.
2. Your facilitator will ask you to form pairs for the practice.
3. Partners will take turns conducting a telephone interview for an open sales professional position.
4. Partners probably know each other well. So when you are the partner being interviewed, help your partner when necessary by "creating responses" to some questions.
5. At the conclusion of each practice, the "interviewer" will give self-feedback on what she/he did well and what she/he might have done differently to improve the interview. The "candidate" then gives feedback. Feedback should relate to use of the skills Ask, Listen, Clarify and Confirm.
6. For the practices, sit back to back to simulate a telephone interview.

Time for practice (approximately 15 minutes):

- Individual preparations – two minutes
- Practice – four minutes per practice
- Feedback – two minutes per practice

Handout #13 – Conducting Effective Sales Team Meetings (Roles and Responsibilities of Sales Managers)

Roles:

- Manage the environment, materials, equipment and process (e.g., prepare materials and equipment, physical layout of the room to promote comfort and learning, and all other preparations that are conducive to meetings)
- Manage the process (i.e., ensure that agenda items address and resolve key issues of sales teams)
- Optimize participation (i.e., inspire sales team members to share their experiences and wisdom)

Responsibilities:

- Prepare
- Set up
- Get the best out of sales team members
- Conclude a meeting
- Follow up

Handout #14 – Preparing for Meetings

Preparations for meetings are often neglected with the result that sales teams become disgruntled and lose confidence in their sales manager's ability to lead them efficiently and effectively in the sales process.

Effective preparation for meetings focuses on defined purposes, objectives and agenda items.

Preparing for a Meeting:

1. Define the purpose and objectives of the meeting.
   - A purpose statement begins with an infinitive (e.g., to discuss; to propose; to inform; to analyze; to research)
   - Sample Purpose Statement: To discuss sales opportunities at ABC Corporation
   - Objectives begin with a noun (e.g., a plan for; an agreement on; a decision to; action steps for)

   Sample Objectives:

   - *A plan of action to secure a meeting with executives at ABC Corporation*
   - *Identification of decision makers in the corporation*
   - *An estimate of possible sales revenue from a partnership with ABC Corporation*

Handout #15 – Practice: Writing Purpose, Objectives and Agenda for a Meeting

Directions:

Part One:

1. Think of a sales meeting you need to have with your sales team.
2. Use the Practice Worksheet on Handout #16 to write:
   - Purpose of the meeting
   - Two–three objectives
   - Two–three possible agenda items
3. Estimated time needed for each agenda item.
4. Refer to *Handout #14 – Preparing for Meetings* to help you complete the worksheet.

Part Two (after you have completed Part One):

1. Pair up with a partner.
2. Take turns sharing your purpose, objectives and agenda items.
3. Give feedback to each other:
   - Are the purpose and objectives clear and understandable?
   - Are agenda items appropriate for the purpose and objectives?
   - Are time frames for each agenda item sufficient?

Time for the Practice (approximately 20 minutes):

- Write the purpose, objectives and agenda items for your meeting – ten minutes
- Share your work and feedback with your partner – five minutes per partner

Handout #16 – Practice Worksheet for Writing Purpose, Objectives and Agenda

Purpose of the Meeting:

Objectives (two–three):

Agenda items (two–three) and time frames for each item:

Handout #17 – Guidelines for Setting Performance Expectations

Success for sales professionals begins when they have a clear understanding of the performance expectations on which they will be evaluated. A few guidelines for sales managers, therefore, are to:

- Express performance expectations as measurable objectives
- Communicate performance expectations to sales professionals
- Support sales professionals in their participation in education and training to develop their sales knowledge, skills and behaviors
- Provide ongoing coaching and feedback:
  - Apply the Four-Step *SalesSmarts™* Coaching Process
  - Focus on strengths of sales professionals
  - Ensure that feedback is a two-way process
- Conduct performance reviews at least quarterly. Sales professionals deserve to know on a regular basis how they're doing and have opportunities to make needed improvements in their performance
- Recognize sales professionals who meet or exceed expectations. Recognition can be:
  - Verbal
  - Written
  - Tangible rewards within the policies of the sales manager's organization
  - Opportunities for promotion and/or career development

Handout #18 – Example of Performance Expectations

Knowledge of Products:

- Knows her/his organization's services and products (objectives, features, benefits)
- Understands relationships between products and how they support each other or can be used to build a curriculum
- Familiar with the general implementation options and learning design

Knowledge of Customers:

- Keeps current with customer initiatives
- Understands industry challenges, trends and buying cycles
- Knows how to identify influencers and decision makers within accounts
- Uses customer buying habits for selling efforts

Selling Against the Competition:

- Demonstrates strategies for talking about the benefits of working with her/his organization
- Effectively fields questions about how her/his organization compares to the competition
- Sells the personal value of customers working with her/his organization

Time and Territory Management Skills:

- Sets and achieves weekly activity goals
- Is organized
- Maintains accurate customer records
- Focuses on activities that lead to revenue attainment

Handout #19 – Worksheet for Drafting Performance Expectations

Directions:

- Your facilitator will ask you to form small groups (four–five per group)
- In your group, brainstorm ten performance expectations that you consider appropriate for sales professionals
- Record your ten expectations on flipchart paper provided by your facilitator
- Your facilitator will ask you to:
  - Summarize your list for the large group
  - Respond to questions and feedback from the large group

Time for the activity:

- Drafting performance expectations – 15 minutes
- Small group reports to the large group – ten minutes
- Debrief – five minutes

Handout #20 –Four-Step SalesSmarts™ Coaching Process

1. **Identify the S.A.L.E. issue.**

2. **Get agreement on the problem and solution.**

3. **Agree on an action plan.**

4. **Follow up.**

Handout #21 – Practicing the Four-Step SalesSmarts™ Coaching Process

Directions:

1. On the following pages are three scenarios that provide you with opportunities to practice applying the four-step coaching process.
2. Your facilitator will ask you to form trios for three rounds of practice.
3. For each round of practice:
   - One person will be the coach for a scenario
   - One person will be the sales professional
   - One person will be the practice manager who monitors the practice and leads the feedback
4. Each trio decides who will be the coach for the first round of practice, the second round and the third round. Within the three rounds of practice, each person will have had an opportunity to be the coach, the sales professional, and the practice managers
5. After each practice, the practice manager will lead feedback for the person who was the coach:
   - First, self-feedback by the coach: what she/he did well, followed by what she/he might have done differently to improve her/his application of the Four-Step *SalesSmarts™* Coaching Process
   - Second, feedback by the sales professional
   - Third, feedback by the practice manager

Time for each round of practice:

- Preparation by the coach and sales professional – two minutes
- Practice of the four-step coaching process – four minutes per group
- Feedback – two minutes